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A PROFILE OF OCCUPATIONAL SKILLS AND TASKS FOR THE OPTOMETRIC RECEPTIONIST AND THE OPTOMETRIC ASSISTANT

by

Ⓒ MARLOWE DOIG LINDBERG

A THESIS
SUBMITTED TO THE FACULTY OF GRADUATE STUDIES AND RESEARCH
IN PARTIAL FULFILLMENT OF THE REQUIREMENTS FOR THE DEGREE
OF MASTER OF EDUCATION
IN VOCATIONAL EDUCATION

DEPARTMENT OF INDUSTRIAL AND VOCATIONAL EDUCATION

EDMONTON, ALBERTA

SPRING, 1986

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The undersigned certify that they have read, and recommend to the Faculty of Graduate Studies and Research, for acceptance, a thesis entitled A PROFILE OF OCCUPATIONAL SKILLS AND TASKS FOR THE OPTOMETRIC RECEPTIONIST AND THE OPTOMETRIC ASSISTANT submitted by MARLOWE DOIG LINDBERG in partial fulfilment of the requirements for the degree of MASTER OF EDUCATION.

K. Puffer
Supervisor

A K Deane

James M Small

Date April 3, 1986

Dedicated to my Husband
Ronald Charles Lindberg
without whose devotion and encouragement
this thesis would not have been possible

ABSTRACT

The major purpose of this research study was to establish job classifications for optometric ancillary personnel by creating a Profile of Occupational Skills and Tasks (POST) for the Optometric Receptionist, and by creating a Profile of Occupational Skills and Tasks (POST) for the Optometric Assistant. The study also sought answers to the following research questions: (a) What skills and tasks are performed by ancillary personnel? (b) Where did optometric ancillary personnel acquire their skills and tasks required by them to function on the job? Did they acquire their skills and tasks prior to entering the job, or did they acquire their skills and tasks after employment, such as, through on the job training and/or by attending seminars? (c) What skills and tasks are not performed by optometric ancillary personnel because further training is required? (d) What is the ranked order, in relative importance, of the skills and tasks performed by Optometric Receptionists and Optometric Assistants as perceived by them?

In order to collect data to develop occupational profiles for optometric ancillary personnel an instrument was created called the Profile of Occupational Skills and Tasks (POST). One POST Chart was created by the developmental workshop committee for the Optometric Receptionists and contained 14 skills, consisting of a variety of tasks

totalling 108. Another POST Chart was created by the developmental workshop committee for the Optometric Assistants and contained 18 skills, consisting of a variety of tasks totalling 122. The validation process resulted in 52 responses from the Optometric Receptionists and 38 responses from the Optometric Assistants which were tabulated and analyzed to determine the major findings. The research was conducted in two phases.

The first phase of the study was the development of two data collecting instruments: one for the Optometric Receptionist and one for the Optometric Assistant. This was accomplished by holding two separate developmental workshops.

The first workshop was to develop the data collecting instrument for Optometric Receptionists and consisted of eight optometric ancillary personnel. Four of the optometric ancillary personnel performed the duties of a receptionist as well as the duties of an assistant, while four performed duties of a receptionist.

The second workshop was to develop the data collecting instrument for Optometric Assistants and consisted of five optometric ancillary personnel. Two persons performed the duties of an assistant as well as the duties of a receptionist, while three performed duties of an assistant.

The second phase of the study was the validation process. In accordance with the Competency Analysis Profile (CAP) System, the data collecting instrument the Profile of

Occupational Skills and Tasks (POST) charts were validated. This was accomplished through a Province-wide mailing to 141 optometric offices. Each office received two POST Charts, one POST Chart for their receptionist and one POST Chart for their assistant.

POST Charts 1 and 2 were the data collecting instruments that provided the data for the findings for the study, while POST Chart 3 showed the rank order, in relative importance of the skills and tasks performed by Optometric Receptionists as perceived by them, and POST Chart 4 shows the rank order, in relative importance of the skills and tasks performed by Optometric Assistants as perceived by them. All four POST Charts are in a pocket attached to the inside back cover of this thesis.

The study showed that of the 14 skills containing 108 tasks that were identified on the data collecting POST Chart for the Optometric Receptionists 30 (or 27%) of the tasks were learned by the majority of responsdents "prior to entering the job", while 57 (or 53%) of the tasks were learned by the majority of the resopondents "on the job". Only one task was identified as an area requiring further training for Optometric Receptionists (majority refers to 50 percent and above of the respondents).

Upon analyzing the 122 tasks that were identified on the data collecting POST Chart for the Optometric Assistants an analysis showed that of the 18 skills containing 122 tasks, 9 (or 7%) of the tasks were learned by the majority of respondents "prior to entering the job", while 82 (or 67%) of the tasks were learned by the majority of respondents "on the job". The need for further training for the Optometric Assistants was indicated in 36 (or 30%) of the tasks.

Based on the findings of the study, recommendations were made to the Alberta Optometric Association that: (a) The Alberta Association of Optometrists use the two Profiles of Occupational Skills and Tasks as the central focus point for having an educational institution prepare a paraprofessional training program for optometric ancillary personnel. (b) Optometrists should use the two POST Charts as a guide for hiring new personnel. (c) Optometrists should use the two POST Charts as the basis for reference while continuing to provide on the job training. (d) That optometric ancillary personnel could use the two POST Charts as a basis to guide their career development.

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Chapter 1

INTRODUCTION

George Elmstrom's book "Advanced Management Strategies for Optometrists" states that:

> Although there is an apparent profession-wide and industry-wide entropy threatening the energy and full potential of our patient-serving ability, management opportunities have never been greater. Let us explore a futuristic plan of attack encompassing maximized personnel assignment and responsibility to serve better, with less aggravation and considerably less waste of time and effort (1982:131).

As the demand for the Optometrist's time evolves around the number of available Optometrists in Alberta to serve a growing population, it becomes necessary for the Optometrist to delegate technical skills and tasks to either an Optometric Receptionist and/or Optometric Assistant. The role expectations for an Optometric Receptionist and an Optometric Assistant do not have a well defined job description that outlines the skills and tasks that could be delegated to them by the Optometrist. Therefore, the Optometrist should evaluate his/her time management process to determine which skills and tasks can and should be delegated to the ancillary staff.

Elmstrom (1982:131) stated that the classical optometric approach toward delegating tasks to assistants for years was "don't do it" or "if you do, be careful." McConkey (1979) pointed out that probably no part of the management process is more misunderstood than delegation, since some Optometrists cling to the time-honored theory that accountability cannot be transferred (Elmstrom, 1982:131). However, Elmstrom's (1982:131) studies indicate that patients don't expect, nor want, the doctor performing tasks they consider demeaning to professional stature; they are indeed better served when the Optometrist rises above the routine and concentrates upon supervision, delegation, diagnosis and therapy.

Elmstrom (1982:132) further points out that people with a higher need for achievement generally want to do things themselves, not supervise others. He cites:

> When the OD (Optometrist) becomes very busy, partnership practice with another professional on the scene would seem to be a logical solution. Without assistants absorbing nonprofessional duties throughout the day, the two optometrists would now tend to spend an appreciable amount of time with duties that are not strictly professional in nature. So the problem of managing time most effectively continues through various modes of practice. This is perhaps the greatest single problem of both the slow and busy professionals and extends into every phase of their lives. Its solution seems obvious to those who seem to do so much more in the same span of time than the rest of us (1982:132).

Elmstrom (1982:132) points out the five advantages found with extension of the Optometrist's meaningful professional time. They are: (1) the doctor is more available; (2) can see more patients; (3) gives better professional care; (4) has time to think; (5) has better health and income.

Elmstrom (1982:133) also found that if an Optometrist can be as little as 20% more effective and productive in serving patients' needs by the intelligent use of aides, manpower has essentially increased one-fifth with a single management tool. He concluded that "we have need of Optometrists, but we also have need for Optometrists who are more productive with their valuable time."

STATEMENT OF THE PROBLEM

Literature survey and interviews with Optometrists discovered that no analysis has ever been performed in Canada to develop an occupational profile chart which identifies the skills and tasks for an Optometric Receptionist and an Optometric Assistant. This study attempts to find answers to the following questions:

1. What skills and tasks are performed in the job of an Optometric Receptionist?

2. To what extent did the Optometric Receptionists acquire their skills and tasks prior to entering the job, on the job or through courses, seminars, or workshops?

3. What skills and tasks relevant to the role of an Optometric Receptionist are not performed because further training and education are required?

4. What is the ranked order, in relative importance, of

the skills and tasks performed by Optometric Receptionists as perceived by them?

5. Which of the tasks ranked high, medium or low in order of relative importance, as perceived by them, are associated with training needs for the Optometric Receptionists?

6. What skills and tasks are performed in the job of an Optometric Assistant?

7. To what extent did the Optometric Assistants acquire their skills and tasks prior to entering the job, on the job or through courses, seminars, or workshops?

8. What skills and tasks relevant to the role of an Optometric Assistant are not performed because further training and education are required?

9. What is the ranked order, in relative importance, of the skills and tasks performed by Optometric Assistants as perceived by them?

10. Which of the tasks ranked high, medium or low in order of relative importance, as perceived by them, are associated with training needs for Optometric Assistants?

SIGNIFICANCE OF THE STUDY

Discussions with practicing Optometrists suggested that the functions of an Optometric Receptionist and an Optometric Assistant are distinct. It was therefore decided to perform a "skill and task analysis" on these two groups: the Optometric Receptionist and the Optometric Assistant.

The purpose of the study was to identify, validate and rank the skills and tasks performed by an Optometric Receptionist and an Optometric Assistant. For this to be accomplished, the researcher developed an instrument called a Profile of Occupational Skills and Tasks (POST), a method adapted and modified from the Design a Curriculum (DACUM) and from the Competency Analysis Profile (CAP) System.

In addition to the DACUM and CAP System, the researcher consulted two Masters' of Education Theses, which were completed by Graduate Students, Elizabeth Dawson (1979) and Robert Spencer (1984), from the Department of Industrial and Vocational Education, at the University of Alberta. The following dimensions which were from the Dawson and Spencer studies included extensions to the validatation process were adapted for this study. The extensions to the validation process utilized by the researcher in this study asked the following questions of the respondents. For example, were the skills and tasks learned prior to entering the job; on the job; or learned during a seminar? The respondents were further asked to indicate whether or not the skills and tasks were relevant, not relevant, or whether the skills and tasks were relevant to their job but additional training would be required in order to perform the skills and tasks.

JUSTIFICATION OF THE STUDY

After reviewing the Canadian Dictionary of Occupations, Careers Canada, Careers Alberta and Occupational Profiles for auxiliary health personnel, it became evident that an established occupational classification has not been established for an Optometric Receptionist and an Optometric Assistant. Further discussions and correspondence with the Alberta Optometric Association, and with the Canadian Association of Optometrists identified that no structured educational and training program is currently available anywhere in Canada for an Optometric Receptionist and an Optometric Assistant (as in Appendix A and Appendix B).

Further justification for the study may be found in the writings of Hindes (1967:7) who indicates that:

> . . . educators are concerned with teaching the skills and knowledge that are necessary to function in various occupations (and that) in order to identify these skills and knowledge we (educators) must conduct an analysis of the occupations. Occupational analysis is a process that examines an occupation and lists the various performance skills and knowledge which in total make up the occupation. The total work environment of an occupation may contain a vast number of elements which could be identified and analyzed. Within this list there exist items that are more critical to the learning process as related to occupational performance. The analysis process must identify these critical items.

Hindes (1967:7) also suggests that "when analyzing an occupation you should always analyze the competent workers' performance. Once the competent workers' performance has been described in the analysis we (educators) can then use it to develop all levels of vocational training and education."

The skills and tasks performed by an Optometric Receptionist and by an Optometric Assistant have not been identified. The practice of these two occupations, educational preparation and on the job training depends upon accurate identification of the skills and tasks. Thus, the major justification of this study is to identify, describe, validate and rank the skills and tasks as perceived by the competent workers who perform the above two occupations.

DELIMITATIONS

The study was delimited to optometric ancillary personnel employed by Optometrists in the Province of Alberta.

Another delimitation was introduced by the Alberta Optometric Association who requested the researcher not to contact the optometric ancillary personnel directly, and that all communications were to be conducted through the Optometrist-employer (as in Appendix A), who may in turn grant approval for his/her staff to participate in this study.

LIMITATIONS OF THE STUDY

Job categories were peculiar to an Optometric office and may or may not be indicative of job categories used in other health care offices. This study was limited to:

1. The study was limited to the survey of Optometric ancillary personnel working in an Optometric office in the Province of Alberta.

2. The study was geographically limited to the Province of Alberta.

3. No uniform educational preparation for an Optometric Receptionist and an Optometric Assistant introduced additional limitations.

4. The validation procedure was another limitation of this study by virtue of the Alberta Optometric Association's request to have the researcher mail the developed charts for validation directly to the Optometrist-employer, who would in turn request the cooperation of their ancillary personnel to take part in this study. Because the researcher was requested by the Alberta Optometric association not to directly communicate with the respondents during the mail-out validation process she was unable to follow up the returned incomplete questionnaires.

Consequently, these incomplete questionnaires are recorded in this study as spoiled data.

ASSUMPTIONS

The following assumptions were made in relationship to the collection of data:

1. The participants who volunteered to take part in the two developmental workshops which created the Profile of Occupational Skills and Tasks (POST) charts for the Optometric Receptionist and Optometric Assistant did accurately reflect the skills and tasks required by Optometric Receptionists and Optometric Assistants in order to function in their jobs.

2. That during the mail-out validation process the sample surveyed was representative of the Optometric Receptionist and the Optometric Assistant and did accurately reflect the skills and tasks required by them in order to function in their jobs.

3. That during the validation phase the respondents understood the instructions which describe how to complete each Profile of Occupational Skills and Tasks chart.

OPERATIONAL DEFINITION OF TERMS

The following operational definition of terms was specifically applied within the framework of the study and is defined here in order to avoid any misunderstanding in the interpretation of chapters that follow.

CAP

The term "CAP" is an acronym for "Competency Analysis Profile" system created by Deane and Manual (Adult Training, Vol. 2, No. 4, 1977). The CAP System was originally designed to be used for occupational and/or job analysis. It was developed to provide a method for creating competency-based learning systems, with emphasis on adult training requirements.

The CAP System has five distinct components: (1) Development of the Profile; (2) Validation of the Profile; (3) Specification of Competencies; (4) Preparation of Learning Resources; and (5) Establishment and Management of Delivery Systems, Collett and Deane (1983:ii).

DACUM

The term "DACUM" is an acronym for "Design a Curriculum" and may be described as an example of a systems approach to instruction.

"DACUM" according to Adams (1975:24), states that DACUM may be defined as a "single sheet skill profile that serves as both a curriculum plan and an evaluation instrument for occupational training programs."

The DACUM consists of two phases: Phase I creates the occupational profile chart through the use of a brainstorming method which identifies general areas of job competencies by a committee of 8 to 12 persons, all of whom currently work in the job, not at a management level. Phase II uses the occupational profile chart developed during Phase I and proceeds with this chart to select and develop learning and audio-visual materials. These materials would be individually prepared or selected to fit each of the identified competencies on the chart.

OD

A graduate degree designation meaning "Doctor of Optometry".

Optometric Assistant

An "Optometric Assistant" is a person who has been hired to assist the Optometrist by performing technical skills under (but not limited to) the Optometrist's care and supervision, that benefit the patient and save the Optometrist professional time.

Occupation

The term "Occupation" refers to a person's job title and applies to an exposition of the duties and responsibilities that are inherent in a particular job; a definition of what a worker should do. A written statement of the duties, responsibilities, and requirements for a specific job.

Optometric Receptionist

An "Optometric Receptionist" is a person who has been hired to attend to (but not limited to) clerical tasks, such as: maintain a filing system, make appointments and receive patients, type letters and maintain an accounting system.

Optometrist

A doctor of optometry (O.D.), a person specifically educated, trained, and licensed to examine the eyes and related structures to determine the presence of vision problems, eye disease, or other abnormalities. He prescribes and adapts lenses, contact lenses, or other optical aids and utilizes visual training to preserve, restore, and enhance the efficiency of vision (Bates, 1983:340).

POST

The term "POST" is an acronym for "Profile of Occupational Skills and Tasks". This was the instrument developed for this study.

Skill

The term "skill" in this study is used to identify major headings on the occupational profile charts and refers to occupational behaviour. From one's knowledge and ability to perform in this job behaviour flows a series of tasks that are performed as a result of having this skill.

Tasks

The term "tasks" in this study is used to identify sub-skills on the occupational profile charts and refers to a series of required job behaviours that are performed as a result of being competent in this skill. For example, the skill is typing and the task is to type a letter.

Validation

"Validation" refers to Phase II of the CAP system. According to Deane and Manuel (1976:03-1) the CAP profile cannot be assumed to be truly representative of the occupation until the document is challenged by a larger population. The validation process will verify the basic document as to validity of content.

Summary

In this chapter the researcher has identified the problem, discussed the significance of the study, the delimitations and limitations of the study, the assumptions, and provided a definition of terms.

Chapter 2

REVIEW OF THE LITERATURE

The literature review is limited to four areas. The first part discusses the need to develop an educational training program for the Optometric Receptionist and the Optometric Assistant. The second is a review of the literature that relates to an occupational analysis as being a process used to examine an occupation and produce educational programs. The third area deals with additional applications and uses for an occupational analysis. The fourth gives an historical overview of the DACUM and CAP systems. This is followed by a brief comparison between the CAP System, the DACUM System plus two research studies completed at the University of Alberta by Graduate Students, Dawson, 1979 and Spencer, 1984.

THE NEED FOR A TRAINING PROGRAM

A frequent question that arises by the Optometrist is: "What tasks do I delegate to an Optometric Receptionist and/or Optometric Assistant?" But, before the Optometrist can answer this question a series of sub-questions needs to be addressed, for example:

1. At what level of competency do I eventually want the Optometric Receptionist and the Optometric Assistant to function?

2. What tasks can be successfully delegated to a receptionist/assistant that will not require my direct supervision?

3. Do I, or any of my staff, have enough time to adequately provide on-the-job training?

4. When I am hiring a new receptionist and/or an assistant what entry-level skills do I want my receptionist/assistant to possess?

5. What continuing education and training would be relevant for the Optometric Receptionist and the Optometric Assistant?

In a study to determine manpower needs for optometrists and the probable acceptance of a proposed technicians training program "On the Optometric Technician in Oregon: A Survey", Bleything (1204:69) describes the use of ancillary personnel as follows:

> Health care professions have long utilized ancillary personnel to increase the efficiency of their practice. The list of the various types of medical and dental technologists is growing yearly. The military has made use of technicians extensively. Experience has taught the physician, dentist and optometrist he can make better use of his time if he has some type of support from office aids.

During the survey Bleything (1204:69) sought through questionnaires to Licensed Optometrists from the state of Oregon, U.S.A., their perceptions of the need for trained ancillary personnel. The results from Bleything's study indicated that "most O.D.'s would like to assign more duties to their office aides -- and particulary technical ones -- if they were trained to accept them." When the Optometrists were further asked their opinion regarding an optometric technician training program, close to 90% voiced an approving nod of such a project.

The current scene in Alberta provides no formal training and relies upon unsystematic on-the-job training by already burdened and busy Optometrists or other members of their busy staff.

Elmstrom (1982:144) maintains that once the Optometrist accepts paraprofessional utilization for maximum effectiveness and develops a finesse in selecting appropriate personnel, there are those elusive elements of training and duties. Elmstrom (1982:144) further points out that:

> Through necessity, optometric assisting personnel are trained in a very informal, one-practice-oriented manner. When an optometrist first procures an aide there tends to be all kinds of management problems. Usually, the OD becomes an on-the-job instructor when and if there is time. The wife who may be familiar with the standard operating procedures may be called upon to assist the new assistant. In all likelihood there will be available a formal text on optometric assisting and an instrument handbook. Occasional study sessions of 1-day "crash courses" are typically encouraged. These building blocks certainly help the new assistant who is new to optometry . If the aide is young, perhaps this is the first visit to an optometrist. It is almost the blind leading the blind.

Bates (1983:16) further describes the job of a paraoptometric as a person to save the optometrist time--to do for the optometric things that do not require a specialized technical and educational background. There are numerous duties, skills, techniques, and instruments to learn. Bates (1983:16) also states that:

> In most optometric offices the ancillary personnel wear a number of different hats. The great majority of doctors are usually reluctant to spend time and energy on the nonoptometric and more mundane aspects of running the office. The handling of fees, the collection of delinquent accounts, the mechanics of a smoothly funtioning appointment schedule, and the efficient utilization of office space and personnel are all tasks that most doctors prefer to delegate to assistants. This leaves a great deal of responsibility to the allied optometric personnel. Don't underestimate the magnitude of this job. Unless the office is large enough that responsibilities can be divided among several people, they can be overwhelming. Frequently one person must serve as paraoptometric, technician, secretary, accountant, bookkeeper, and friend of the patients.

If the Optometrist does not have a solid foundation for reference, such as an occupational profile for Optometric Receptionists and Optometric Assistants, there will remain many unanswered questions for the optometric profession with regard to the best utilization of their staff and their staffs' training needs. As the number of Optometrists using paraprofessionals increase, a classification of occupations and effectively planned educational programs must be provided for the Optometric Receptionist and the Optometric Assistant. The education programs should be offered through the Alberta Optometric Association and brokered by an educational institution that certifies the programs.

Bates (1983:16) states that, "The optometric allied health personnel career field has become a distinct health care occupation, despite some evidence that the career is not clearly understood throughout the professions."

The researcher feels that an approach to classifying occupations would be appropriate in the area such as that of an Optometric Receptionist and Optometric Assistant where currently there is no clearly defined job description. This can be accomplished through an occupational analysis. According to, Bradin and Paul (1975:91) classification of occupations can provide a sound basis for describing and evaluating jobs: educational and training requirements; a guide to determine educational and manpower needs.

Finch and Crunkilton (1979:103) feel that it is vitally important to ensure that content is identified which reflects needs of the work world. They feel that when content is derived from the world of work and precedes the formal establishment of goals and objectives, the result will be more tangible, meaningful curriculum outcomes.

One of the best methods for obtaining relevant content for educational instruction is through an occupational analysis. Hindes (1976:7) states that if "we as educators are concerned with teaching the skills and knowledge that are necessary to function in various occupations . . . we must conduct an analysis of the occupations."

OCCUPATIONAL ANALYSIS

Analyzing occupations or task analysis as it is sometimes referred to had its beginning around the 1960's. Finch and Crunkilton (1979:121) cited that:

> refinements have enabled curriculum developers to make more objective decisions regarding content that should be included in various curricula. Of particular note was research conducted at the Personnel Research Laboratory, Lackland Air Force Base, Texas, which resulted in the development of a procedural guide for conducting occupational surveys (Morsh and Archer, 1967). This guide has enabled educators to study systematically the behavioral aspects of job requirements. Further refinement and use of the task analysis process by groups such as the Vocational-Technical Education Consortium of States (V-TECS) has shown this approach to be quite applicable to public vocational and technical education (Lee, 1976).

Finch and Crunkilton (1979:121) define the fundamentals of a task analysis as a process wherein tasks performed by workers employed in a particular job are identified and verified while Hindes (1976:7) defines the process of a task analysis in a similar manner. For example, he states that an occupational analysis is:

> a process that examines an occupation and lists the various performance skills and knowledge, which in total make up the occupation. The total work environment of an occupation may contain a vast number of elements which could be identified and analyzed. Within this list there exists items that are most critical to the learning process as related to occupational performance. The analysis process must identify these critical items.

Hindes (1976:7) further points out that when analyzing an occupation educators should always analyze the competent workers' performance. Once the competent workers' performance has been described in the analysis we can then use it to develop all levels of vocational training and education.

Blank (1982:94) states that analyzing an occupation involves breaking it down into its component parts-tasks. Similarly, analyzing a task involves breaking it down into its component parts-steps and supporting knowledge and attitudes. He describes a task analysis as a process of identifying and writing down the specific skills, knowledge, and attitudes that distinguish someone who performs a task competently from someone who cannot perform the task at all.

In addition, The National Centre for Research in Vocational Education (1978:7) suggests that an occupational analysis is an orderly process for determining the makeup of a whole by dividing it into its essential parts. And their definition for an occupational analysis or a job analysis is the systematic identification, usually for instructional purposes, of the essential tasks which workers (employees) are required to perform on the job. Such an analysis may also include working conditions, technical knowledge required, and worker qualifications.

Similarly, Bradin and Paul (1975:91) describe job analysis as being a process of determining, by observation, interview, and study, and of reporting the significant work of a specific job. It is the identification of the tasks which comprise the job and of the skills, knowledge, abilities, and responsibilities required of the worker for successful job performance.

Butler (1972:78) stated that his first step in task analysis is to identify the kinds of performance capabilities demanded by the tasks. Each task must be analyzed to determine what kinds of learned performances are involved, for this information is the basis for all instructional system design decisions. The selection of appropriate objectives, content, sequence, method, media, and criteria depends on the correct identification of the capabilities needed to perform the tasks.

Likewise, Knowles (1980:122) states that in order to translate needs into program objectives the starting point is from the pool of needs that have evolved. One of the methods Knowles mentions (1980:101) is through a Job Analysis and Performance Review. This produces specific and precise information about job performances that are directly tied to actual job and to on-the-job performance by breaking the job into segments that are manageable both for training and for appraisal purposes.

The writers, Hindes (1976), Blank (1982), National Centre for Research in Vocational Education (1978), Bradin and Paul (1975), Butler (1972) and Knowles (1980) agree that an occupational analysis is the most appropriate methodology of identifying the kinds of learned performances for an instructional system (design) which will reflect the needs of the world of work. An occupational analysis identifies specific skills, knowledge and attitudes in an orderly process that determines the whole by analyzing the competent worker, then dividing the whole into identifiable job performance tasks that are required to perform successfully on-the-job. The analysis process, when properly conducted can provide educators and curriculum developers with a sound foundation for developing an entire program of studies.

Specifically, Hindes (1976:34-5) points out that if the analysis is properly conducted, it will serve as a sound foundation for the development of the entire program or course of study. If you make an accurate determination of the critical skills and knowledge, you can translate them into precise learning objectives and design valid tests for your objectives as your course must rely upon the foundation of objectives and tests, but, he warns, this foundation will be only as good as your analysis. Therefore, it goes without saying that the efficiency and effectiveness of your course will depend upon your analysis.

ADDITIONAL APPLICATION AND USES FOR AN OCCUPATIONAL ANALYSIS

Hindes (1976:43) describes various uses for an occupational analysis in his "Guidelines for Using Analyses". The four major results Hindes obtains from his occupational analysis can provide him with task statements, become a basis for decision making, identify instructional materials and finally to perform program and course evaluation.

Firstly, he uses an occupational analysis to identify "task statements". Hindes feels that "task statements" are vital to the development of curriculum as it provides the basis for writing student objectives for a course, plus identify each of the critical steps in order to facilitate the student mastering each "task step" before attempting to perform the total task. Secondly, he feels that an analysis document can provide a basis for developing tools and equipment lists, planning needed facilities and identifying learning materials such as, textbooks and occupational references, and evaluating commercially produced teaching materials by comparing their content and objectives to the suggested content in the analysis. His third reason for doing an analysis document is to identify instructional materials and learning resources that can be shared between programs by identifying similar or identical tasks which are performed in different occupations. The analysis information can aid in: identifying fundamental skills, such as, reading and math which the student must develop, standardized tests can be selected to measure student achievement while other tests can be identified and used before and after instruction. Finally, this occupational analysis document can provide for a course and program evaluation.

The National Centre for Research in Vocational Education at Ohio State University (1978:3-6) describes five results they obtain from their occupational analysis. They feel that for vocational teachers, the overriding purpose for conducting an analysis of an occupation is to obtain a sound basis for designing, revising, or updating a training program. It also helps teachers evaluate the progress of students toward their occupational goals.

First, the type of information from an occupational analysis is often given to a prospective worker (employee) to explain what he/she is or will be expected to do on the job. This helps the worker (employee and the employer) understand the requirements of the job, and the responsibilities and functions he or she will have. Secondly, an occupational analysis can serve as a basis for organizing the job. During such an organizational effort, decisions might be made regarding the sequence in which work is to be performed, or which workers will perform certain tasks. With these decisions in place the work can be performed efficiently and objectively. The third reason for an occupational analysis is to assist in producing educational programs. Once specific workers' skills are identified, a sound basis exists for identifying the types of educational experiences a potential worker should be provided with in order to be competent in those skills. The fourth purpose for an analysis is used in evaluation. For example, knowing exactly what is involved in a job or occupation enables one to determine whether an individual is carrying out his/her work role. It also provides a basis for evaluating how well an individual in a training program is progressing. Their fifth reason for conducting an occupational analysis is to stay current. Often, a new analysis results in the identification of unnecessary or obsolete skills which should be eliminated from an existing program.

The National Centre for Research in Vocational Education at Ohio State University (1978:6) summarized the rationale for an occupational analysis by stating that:

> it is important that we continue to identify the critical knowledge and skills needed if the goal of vocational education--that of successful employment in an occupation suited to the needs and interests of each individual--is to be met. Since it is possible to design a good educational program only when the end results being sought are clearly stated, the analysis of an occupation is an important step in the vocational education planning and curriculum development process.

Why conduct an occupational analysis? Because an occupational analysis can identify the competencies which are composed of occupational skills which in turn are broken down into specific tasks. This is accomplished in an orderly process that allows curriculum developers to sequence and structure an instructional system design. As Tuchman (1970:156) suggests:

> A curriculum cannot consist of an infinite or near infinite series of disconnected sequences. Each sequence can take an additional meaning by being grouped and connected to other sequences which relate to it not only in terms of goal objective, but in terms of the nature of skill or competency or knowledge which the sequence is an attempt to facilitate.

Bruner (1963:25) referred to the importance of structuring the curriculum and points out that:

> The basic thing that can be said about the human memory, after a century of intensive research, is that unless detail is placed into a structured pattern, it is rapidly forgotten. Organizing facts in terms of principles and ideas from which they may be inferred is the only known way of reducing the quick rate of loss of human memory.

Summary

In summary, an occupational analysis is defined as a systematic process of identifying skills and knowledge required to function on the job and/or in society. An analysis is the breaking of an occupation down into parts to identify the component parts then systematically synthesising the parts to make a whole.

THE DACUM AND CAP SYSTEMS

An Historical Overview of the DACUM

Adams (1971:1) describes the development of the DACUM (Developing A Curriculum) as a new approach to the development of curriculum which was combined with a new evaluation process for occupational training programs. He states that the DACUM was created initially in a joint effort by the Experimental Projects Branch Canada Department of Regional Economic Expansion, and General Learning Corporation of New York, which provided technical direction to the Job Corps program at Clinton, Iowa. He further states that the early efforts in this area were intended to produce a curriculum guide that would enhance trainees involvement in the training program and in planning for their own goal attainment. Following these early efforts an experimental DACUM for a typical occupation was developed as a model for further application. This was introduced to the NewStart Corporation during their planning stages. The idea was adopted by Nova Scotia NewStart Inc.

The DACUM System is based on skills, rather than knowledge, in the belief that the necessary knowledge will be exhibited in the skills demonstrated by the graduate, whereas the Competency Analysis Profile (CAP) System developed by Deane and Manuel in 1975, is based upon students achieving levels of cognitive, attitudinal and psychomotor skills.

Historical Overview of the CAP Model

Deane (1984:24) mentions that after being influenced by the results and operations of various training programs using the DACUM approach, he and Manuel developed the Competency Analysis Profile (CAP) System. This particular version of the CAP, a modular, skills-oriented training system had been developed in 1975, at the Department of Industrial and Vocational Education of the Faculty of Education, University of Alberta.

Subsequent Developments Based on the CAP System

Subsequent to the development of the CAP System a number of research studies have taken place by Graduate Students from the Industrial and Vocational Department, University of Alberta. In addition to these research studies, the CAP System was employed by the Industrial and Vocational Department to create the Catalogue of Adult Basic Skills for the Field Services Division, Advanced Alberta Education on behalf of the Alberta Vocational Centres and the Community Vocational Centre.

CAP System Compared to the DACUM and Subsequent Research

Using the CAP as the prototype the next section of this literature review will investigate the similarities and differences between the CAP as the prototype system with the DACUM, plus the two research studies completed by Graduate Students from the Industrial and Vocational Department, University of Alberta.

The CAP System consists of five phases:

Phase I - Occupational Analysis and Competency Profile Development

Phase II - Validation of Profile and Certificate

Phase III - Development of Specific Training Objectives and Performance Standards

Phase IV - Development of Specific Training Resources

Phase V - Establishment and Management and Training Program Delivery

The DACUM, Dawson (1979:14) and Spencer (1984:29) used Phase I - Development of a Profile in the same manner, for example:

> Phase I creates the occupational profile chart through the use of a brainstorming method which identifies general areas of job competencies by a committee of 8 to 12 persons, all of whom currently work in the job, not at a management level.
>
> The DACUM departs from Phase II of the CAP system and proceeds to its own final Phase II. Spencer (1984:24) cites Phase II of the DACUM:
>
> After the completion of a "DACUM" occupational profile chart based upon the above process (Phase I - DACUM) the program development model is then utilized. This model would take each of the identified skills and prepare individual learning batteries (Phase II - DACUM) which would include:
>
> 1. Selecting printed learning materials.
> 2. Developing printed learning materials.
> 3. Selecting audio visual learning materials.
> 4. Developing audio visual learning materials.

These would be individually prepared or selected to fit each of the identified competencies.

Adams (1971:3) states that a DACUM is, "in fact, a form of analysis of the occupation rather than a curriculum evolving form of analysis."

In contrast to the DACUM, Phase II of the CAP is the validation process for the occupational profile that was developed during Phase I. The procedure in Phase II for validating the occupational profile described by Deane and Manuel (May, 1976:03-1) is to submit the basic CAP document to the largest possible number of practitioners in the occupation for their consideration. The resultant feedback is analyzed and incorporated back into the original profile.

Dean and Manuel's (1976:03-1) assumption for the validation process is that a larger cross-section of practitioners will be more representative of the occupation than the original team . . . and that the people who work in the occupational field on a day-by-day basis will have the most relevant information about that occupation.

Extending from the CAP and DACUM systems, the two research studies under review were different in the following procedures. During the validation procedures (Phase II - CAP) the studies (Dawson and Spencer) have incorporated another step in the validation phase which provided additional information, such as:

In Dawson's study (1979:30) during the validation she asked the respondents two additional questions: (1) Respondents were asked to indicate if they used the competency as stated in the box on the Profile Chart. If they circled "yes" (Y), they were asked to circle the response which best described where they had acquired the skill: in a diploma nursing program (RN), on the job (JOB), or in some form of advanced training beyond a diploma nursing program (ADV). And question (2): If the respondents did not use the competency as stated in the box on the Profile Chart, they were asked to circle "no" (N), and were asked to make a judgment regarding the relevance of that competency to their job. They could indicate that the competency was not relevant (N/R) because there was no such hazard, or, it was the responsibility of another member of the occupational health team, or, they could indicate that it was relevant (R) but not used for some reason such as: requiring additional training, or not considered part of the occupational health nurse's role by the employer.

Although Spencer's study (1984:40) followed Dawson's study quite closely he asked two additional questions: Question (1) Respondents were asked to indicate if they use the skill as stated in the job. If they circled "yes" (Y), they were asked to circle the response which best described at what point in career development the skills were acquired: prior to employment as an inspector (P), on the job during employment as an inspector (J), or in some form of formal course, seminar or workshop while employed as an inspector (C). Question (2): If respondents did not use the skill as stated in the box on the Profile Chart they were asked to circle "no" (N). Next they were asked to circle the response which best described why they did not perform the skill: not relevant or required for the occupation (NR), or required but not trained to perform this skill (NT), or required but not assigned to perform this skill (NA).

The two Master's of Education Theses in this literature review did not continue with Phases III, Phase IV, or Phase V, as described by the CAP system.

Phase III of the CAP is the development of specific training objectives and performance standards. Deane and Manuel (1976:04-1) describe Phase III as the input for the purpose of setting out the objectives for each box in the profile. The procedure they used is as follows:

> The objectives for each CAP box must take into account that every competency statement considers the cognitive, affective and psychomotor domains. The objectives must be written in a clear, concise manner and must reflect the reality of each box.
>
> Every domain will have a scale indicating the levels of proficiency which are relevant to the occupation which has been analyzed. . . .

The persons who take part in writing the educational objectives according to Deane and Manuel (1976:04-1) are:

> 1. People who are expert in the field of writing educational objectives are the best people to draw up the objectives for each competency statement.
>
> 2. Workers in the occupational field are in the best position to determine if the objectives are realistic and representative in relation to training the people entering the field.
>
> 3. Technical experts are needed to determine the correct phraseology and terminology used in the objectives.

Phase IV of the CAP is the preparation of learning resources. The rationale for the Competency Analysis Profile according to Deane and Manuel (1976:05-1) is to individualize instruction to the point where a learner can enter any particular learning module when he needs to. To achieve true individualization the learning resources pertaining to each competency statement in the profile must be complete, self-contained, and accessible to the learner.

Deane and Manuel (1976:05-1) further cite that in order for a transition from group learning management to individualized learning management, or for those environments where group learning management will continue, the learning resources are developed for each single competency statement.

Phase V of the CAP system is the establishment and management of delivery systems. Deane and Manuel (1976:06-1) state that this is when the interfacing of the learner and learning resources first come about. The user organization must develop a philosophy of learning which relates to competency-based learning to fully utilize the products of Phases I through IV.

To establish the management of the delivery systems Deane and Manuel (1976:06-1) suggest that the learning modules are identified by each user organization by deciding to cluster or not to cluster related competencies. The degree to which clustering would take place depends upon:

1. ... the learning environment available . . .
2. ... timetable of clients, and

3. ... the degree of similarity that exists between competencies on the profile.

Deane and Manuel (1976:06-1) summarize their CAP system by indicating that the management of learning environments is a complex task, made even more complex when the majority of any given environment is made up of several individual learning environments. . . . One effective tool to utilize for managing the delivery system is to employ a flow charting techniques such as Program Planning and Review Technique (PERT) or the Critical Path Method (CPM).

The National Centre for Research in Vocational Education in their "Competency-based Vocational Education Administrator Module: Direct Curriculum Development" (1983:24) indicate the importance of starting programs with a listing of competencies or a chart, for example:

> It is of critical importance in competency-based vocational training programs that you start with an accurate, complete, and verified competency listing or chart. Without this, no matter how well the rest of the curriculum is developed, or no matter how well the delivery of instruction is organized, the competency-based education (CEB) program is an exercise in futility. Students may be industriously achieving each specified competency in the program but, if they are the wrong competencies, students will not be properly prepared to enter the occupation.

The researcher was influenced by the CAP system developed by Deane and Manuel and the two research studies of Dawson and Spencer previously described, and the application of the CAP system used by Collett and Deane for developing the Catalogue of Adult Basic Skills. In addition the researcher's occupation as the Research Officer for the Adult Basic Education Project, implementing the Catalogue of Adult Basic Skills into the adult basic education curriculum for The Alberta Vocational Centres and the Community Vocational Centre in the province of Alberta has greatly influenced her research and methodology. The Profile of an Occupation of Skills and Tasks (POST) methodology used in this study will be discussed in Chapter 3 of this thesis.

Chapter 3

INSTRUMENTATION AND METHODOLOGY

This chapter presents the methodology utilized to develop the data collecting instruments for the Optometric Receptionists and the Optometric Assistants. It describes how the population was selected to develop the data collecting instrument, the procedures used to develop the data collecting instrument, the description of the population utilized for the validation procedures on the data collecting instrument, and how the data was treated.

This study was conducted in order to establish an occupational profile chart that would identify the skills and tasks required by ancillary personnel to function on the job while being employed in an optometric office. Consequently, during June 1984, while the proposal for this study was still in a rudimentary stage, the researcher attended an annual conference of the Alberta Association of Optometrists in Red Deer. The reason for attending this Conference was to meet and discuss with the Optometrists and their ancillary personnel the concept of having an occupational profile chart developed for optometric ancillary personnel and to point out the benefits that could be derived from such a study. For example, the benefits would be: firstly, there would be one reference point that Optometrists could use for hiring new staff. Second, there would now be a reference point that the

Alberta Association of Optometrists could use in order to provide immediate upgrading courses and seminars for the currently employed ancillary personnel. And, third, there would be one reference point that the Alberta Association of Optometrists could use in order to prepare educational programs that would train optometric receptionists and assistants.

In discussions with Dr. Margaret Penny, Optometrist and Chairperson for a committee responsible for optometric staff development, she stated that the Committee for Optometric Staff Development is currently attempting to develop and provide an educational program for optometric assistants in the Province of Alberta. Based upon discussions between the Committee for Optometric Staff Development and the Southern Alberta Institution of Technology it has been anticipated that such a program will be taught through the Southern Alberta Institution of Technology. However, the Committee are awaiting the instructional program materials for optometric assistants from the American Optometric Association. In the meantime, she felt a research study such as this one would be very timely and I was asked if I would assist the Optometric Staff Development Committee Canadianize the materials from the American Optometric Association and review the Committee's proposed programs for the optometric assistants working in the Province of Alberta.

At the conclusion of the Alberta Association of Optometrists' Conference in June 1984, the researcher felt there was sufficient interest and support to continue to undertake this study. The following paragraphs in chapter three will describe the methodology utilized for the conductance of this study.

Methodology Utilized to Develop the Data Collecting Instrument

The data collecting instrument created and utilized to collect data for conductance of this study was an occupational profile chart called a Profile of Occupational Skills and Tasks (POST). The design for the POST instrument and the methodology used for this study were developed by choosing and adapting selected procedures from "Design a Curriculum" (DACUM), the "Competency Analysis Profile" (CAP) System, and from Dawson (1979) and Spencer (1984) Masters of Education Theses.

The DACUM: Brainstorming from the "DACUM" was used as a method to identify the job competencies and prepare a profile chart for optometric ancillary personnel.

The CAP System: The CAP System offered two areas that were adapted for this study. Firstly, the criteria for selecting the population to take part in the brainstorming developmental stages. Secondly, as suggested by the "CAP" System, the validation process was utilized in order to obtain feedback from a larger cross-section of the population.

The Dawson and Spencer Theses: From the Dawson (1979) and Spencer (1984) studies the researcher adapted and modified their concept of utilizing abbreviated symbols on the data collecting instrument. The abbreviated symbols were placed within each of the occupational task areas. This was done in order to collect additional information from the group who were taking part in the validation process.

The Profile of Occupational Skills and Tasks (POST) system resulted from the modifications and adaptations of the above three studies. A major difference in this study was the introduction of ranking the skills and tasks. The criteria used to rank the skills and tasks, by the respondents, during the validation process, was that the skills and tasks be ranked from the most to least important, as perceived by them, to function on the job.

The Population and Methodology Selected to Develop the Data Collecting Instrument

The identification of the skills and tasks that were presented on the data collecting instrument (the POST) was provided by a team of nine optometric ancillary personnel representing a cross-section of ancillary optometric personnel in the Province of Alberta. According to Deane and Manuel (1977:31) the assumptions for selecting current practitioners is to provide the most relevant information about the competencies required to function satisfactorily in the field. In addition, a profile that is developed through the combined efforts of team input is superior to individual input, and through the synergy of the brainstorming process the output of a team is far greater than the individual inputs that might be gathered from the same team members in a one-to-one interview session.

Methodology Used for Selecting the Developmental Workshop Population: The population for the developmental workshops were obtained by corresponding with optometric ancillary personnel who were currently employed in optometric offices.

On October 8, 1984, correspondence took place among thirty-three urban and five rural optometric offices within the Edmonton and surrounding area (as in Appendix C). The letters to the optometric and ancillary personnel informed them that the researcher was planning developmental workshops in order to develop an occupational profile for their occupations and that their assistance in this area would be of great value. The first workshop was planned to create the skills and tasks of a receptionist working in an optometric office, and the second workshop was planned to deal with the skills and tasks performed by assistants working in an optometric office. In order to assist the optometric and ancillary personnel determine which workshop or workshops they might wish to attend, a description was provided of the duties that a receptionist is most likely to perform in his/her job, and the duties that an assistant is most likely to perform in his/her job. The letter included the dates, times and place for each of the workshops as well as requesting the ancillary personnel to contact the researcher if they wished to take part in this research study.

Resulting from the letters that were mailed October 8, 1984, requesting ancillary personnel to participate in this study, the researcher was contacted by eleven optometric ancillary personnel. During these telephone conversations it became evident that the optometric ancillary personnel were not sure which workshop they would attend. In many optometric offices the duties of a receptionist and of an assistant quite often overlap and are not clearly defined. In smaller optometric offices an assistant may perform the functions of both the receptionist as well as that of an assistant.

A dilemma such as this was of no surprise to the researcher as no systematic attempt has ever been made to classify the two occupational areas and part of this study is to accomplish job classifications for optometric ancillary personnel. Currently, the occupational duties for optometric ancillary personnel have been based upon the following criteria: 1) the size of an optometric practice and whether or not it was an urban or rural practice, 2) the availability of personnel, and 3) the provisions within each optometric office for on-the-job training.

Resulting from the lack of job titles and job classifications of occupational duties that are performed by optometric ancillary personnel, it appeared to be in the best interests for this study that the workshops should become heterogeneous rather than homogeneous as this would assist in determining whether or not there should be one or two job titles and occupational profile charts developed: one for the optometric receptionist and one for the optometric assistant.

Participants in the Developmental Workshops: The following is a breakdown of the heterogeneous population who attended both developmental workshops. This includes a description of their current occupational job titles; the approximate number of years they have been working in an optometric office; the size of the optometric practice, and whether or not the optometric office they work in is urban or rural.

The specific background of the participants who took part in the first workshop which produced the profile chart for the Optometric Receptionists, is as follows:

1. A Receptionist who performs some assistant duties, with fifteen years experience employed in an urban optometric practice with one Optometrist. She attended only the first developmental workshop.
2. An Assistant (trained ophthalmic dispenser) who performs all of the assistant's duties and all of the receptionist's duties has had over fifteen years experience. She is employed in an urban optometric practice with one Optometrist. She attended both of the developmental workshops.

3. A Receptionist with over five years experience employed in a rural optometric practice with one Optometrist. She attended only the first developmental workshop.

4. An Assistant who also performs receptionist's duties has had over five years experience, and is employed in an urban optometric practice with four Optometrists. She attended both developmental workshops.

5. A Receptionist with over five years experience employed in an urban optometric practice with two Optometrists. She attended only the first developmental workshop.

6. A Receptionist with over two years experience and is employed in an urban optometric practice with three Optometrists. She attended only the first developmental workshop.

7. An Assistant with over two years experience and is employed in an urban optometric practice with four Optometrists. She attended both developmental workshops.

8. A Receptionist with one year experience employed in an urban optometric practice with one Optometrist. She attended only the first developmental workshop.

Eight optometric and ancillary personnel attended the first developmental workshop which was held October 27 and 28, 1984, at the Alberta Vocational Centre, Edmonton, from 9:00 a.m. to 4:00 p.m. Coffee and lunch along with an honorarium was provided. The researcher's husband, a practicing Optometrist was present throughout the developmental workshop assuming the role of a resource person and a recorder for the researcher.

The heterogeneous population that attended the first developmental workshop consisted of four persons who performed the duties of a receptionist as well as the duties of an assistant, and four persons who performed only receptionists' duties.

The specific background of the participants who took part in the second workshop which produce the profile chart for the Optometric Assistants, is as follows:

1. An Assistant who is a licenced ophthalmic dispenser with over fifteen years experience employed in an urban optometric practice with one Optometrist performs all the duties of an assistant and all of the duties of a receptionist. She attended only the second developmental workshop.

2. An Assistant (trained ophthalmic dispenser) who performs all of the assistant's duties and all of the receptionist's duties has had over fifteen years experience. She is employed in an urban optometric practice with one Optometrist and attended both of the developmental workshops.

3. An Assistant who also performs some of the receptionist's duties and has had over five years experience is employed in an urban optometric practice with four Optometrists. She attended both developmental workshops.

4. An Assistant with over two years experience employed in an urban optometric practice with four Optometrists. She attended both developmental workshops.

5. An Assistant with less than one year of experience employed in an urban practice with four Optometrists. She attended only the second developmental workshop.

Five optometric ancillary personnel attended the second developmental workshop. The workshop was held November 3 and 4, 1984, at the Alberta Vocational Centre, Edmonton, from 9:00 a.m. to 4:00 p.m. Coffee and lunch along with an honorarium was provided. (Initially, six participants had agreed to attend, but one could not attend due to illness.) The researcher's husband, a practicing Optometrist, was also present at the second developmental workshop and assumed the role of resource person and recorder for the researcher.

The heterogeneous population who were in attendance at the second developmental workshop consisted of two persons who perform the duties of an assistant as well as the duties of a receptionist, and three persons who perform only assistants' duties.

The Procedure Utilized for the Development of the Data Collecting Instrument

The equipment required to hold the workshops included:

1. A classroom with comfortable chairs and tables that were placed in a semi-circle to allow for group interaction and to provide the group with an unobstructed view of the wall that was being used to create the profile. This wall was the working surface which showed the developmental stages of the profile chart.
2. A well ventilated and well lit room.
3. 8" x 11" file cards to list the skills vertically on the wall.
4. 4" x 6" fille cards to list the tasks horizontally on the wall.
5. Felt tipped pens used to write on the file cards.
6. Masking tape used to adhere the cards to the wall.
7. Paper and pencils for the participants to make notes.
8. A large coffee urn and refreshments.

9. Sample copies of occupational profile charts from different occupational classifications were displayed. This was to assist the participants at the developmental workshops to visually comprehend an occupational profile and to further assist the participants to conceptualize the terminal objectives for the developmental workshops.

10. A copy of the Catalogue of Adult Basic Skills as a sample of what can be created using the CAP system.

11. An honorarium for the participants.

12. Name tags for the participants.

13. Arangements with a nearby restaurant to take the participants to lunch.

Developmental Workshop: On the first day of each developmental workshop the researcher welcomed the group and introductions were exchanged. An overview of the day's agenda and terminal objectives for the developmental workshop were explained to the participants. Examples of occupational profile charts for Dental Receptionists and Dental Assistants were displayed. Although these charts were from another job classification, they were displayed in order to assist the participants at the developmental workshops to conceptualize a completed profile chart. The profile charts that were displayed for the Dental Receptionists and the Dental Assistants were developed by the Division of Post-Secondary Education, Curriculum Development Branch, Department of Education, Province of British Columbia.

The Occupational Classifications: Confirming the occupational classifications according to Mitchell (1983:5) is not merely an exercise in semantics; it is a matter of accurately defining the range and scope of an occupation. He further stated that an accurate job title helps to keep the group on track, as it begins the process of identifying specific skills.

The initial step taken by the researcher was to establish whether of not enough distinction between the occupational duties performed by the receptionists and assistants working in an optometric office were sufficiently different that an occupational profile should be established for each group. Or, alternatively if the distinctions between the two groups were so slight then only one occupational profile and only one job title would be developed. In order to identify the name(s) that would be given to the job title(s) for optometric ancillary personnel, the researcher requested the developmental workshop participants to first identify the occupational duties required by a receptionist and then identify the occupational duties required by an assistant working in an optometric office. A brainstorming procedure was utilized.

Through the use of the brainstorming method the participants identified occupational duties that they performed. All the suggestions were placed on cards which were then placed on the blackboard in the order in which they were put forth by the workshop participants. This procedure was performed without classifying the occupational duties to a job title. It was only after the brainstorming session was complete that a discussion took place to see if there was a natural division among the occupational duties that had been identified. Group consensus indicated that a division between the occupational duties for receptionists and assistants working in an optometric office were sufficient enough to establish two job titles and two accompanying profile charts. Subsequently, the occupational title and accompanying profile chart for a receptionist working in an optometric office was identified as an Optometric Receptionist, and the occupational title and accompanying profile chart for an assistant working in an optometric office was identified as an Optometric Assistant.

Once the group confirmed that two job classifications were necessary these job classifications were written on an 8" x 11" card. (The first developmental workshop dealt with the skills and tasks for an Optometric Receptionist, whilst the second developmental workshop dealt with the skills and tasks for an Optometric Assistant.) The job title was placed to the extreme left on the blackboard. The next procedure was to identify the skills for the job classification.

During the first and second developmental workshops the researcher continued to act as a catalyst for the workshops, while the Optometrist assisted as a resource person and recorder for the elements of the evolving charts.

The brainstorming procedure was continued as a means of identifying the skill areas that fell under the specific job title. As the skills were recorded on 3" x 5" cards they were placed on the wall in the order they were identified by the group. After a number of skills were identified a review and modification of the skills took place checking for any omissions or redundancies and to correct the wording on the cards. Once this was accomplished and the group reached a consensus the skills were sequenced on the wall vertically from the most to least important skill required in order to function in the occupation.

Once the skills had been identified and ranked the group's attention was directed toward identification of the tasks that would be performed within each skill. Using the brainstorming procedure the tasks that would be performed within each skill were identified. As the tasks were identified by the group they were recorded on 4" x 6" cards and arranged on the wall horizontally opposite the related skill. Each skill area was completed as much as possible before proceeding to the next skill. After the group had identified all the tasks in each skill a review and modification took place to check for omissions, redundancies and to correct any words or phrases on the card.

Final inspection for omissions, redundancies and a review of the wording on the finished Profile of Occupational Skills and Tasks (POST) took place. After this final review had been completed and all the modifications had taken place to the satisfaction of the group, the task analysis part of the workshop was over and the POST data collecting had been created.

Two Profiles of Occupational Skills and Tasks: Chart 1, the Profile of Occupational Skills and Tasks for an Optometric Receptionist contained fourteen skill areas and one hundred and eight tasks. Chart 2, the Profile of Occupational Skills and Tasks for an Optometric Assistant contained eighteen skill areas and one hundred and twenty-two tasks. Approximately one hundred and fifty blueprints of each profile chart were prepared for the mail-out validation process of this study. See Chart 1 and Chart 2, in the pocket at the back of this thesis.

The Validation Process

In accordance with the Competency Analysis Profile (CAP) system, the data collecting instrument the Profile of Occupational Skills and Tasks (POST) charts were validated. This was accomplished through a provincial-wide mailing to optometric ancillary personnel employed in an optometric office. The POST charts were mailed directly to the optometrist-employer. A mailing list of Optometrists who were members in good standing during the year 1984-85 was obtained from the Alberta Optometric Association.

On December 6, 1984, 141 optometric offices in Alberta were mailed two profile charts, a stamped self-addressed envelope and a letter requesting the Optometrist to ask their ancillary staff to participate in the validation process of this study. Also enclosed was a letter of instructions to their ancillary staff (as shown in Appendix E) with the directions on how to complete the data collecting instruments (the POST).

The respondents who agreed to validate the POST charts were asked to read over both profile charts and pick the profile chart that best described their occupational duties. Following this, the respondents were asked to rank the skills numerically from the most to least important skill required by them in their occupation. Upon the completion of the ranking for each skill the respondents were then asked to now rank the tasks for each skill. The tasks were ranked within each skill, and were ranked numerically from the most to least important task required by them to function in their job.

The abbreviated symbols used during the validation phase of this study were to obtain answers to questions asked on the POST charts, for example: Question 1 asked the respondents to circle "Y" for (yes) to indicate if they performed this task. If the respondents perform this task they were then asked to indicate where they learned this task by choosing one of the following symbols: "P" to indicate they learned the task prior to entering the job or they could choose "O" to indicate they learned the task through on-the-job training, or they could select "S" to indicate they learned the task in a seminar or course of study after being employed. Question 2 asked the respondents to circle the symbol "N" (no) if they did not perform this task. If the respondents circled "N" indicating they do not perform this task they were then asked to indicate why they did not perform this task by further choosing one of the following symbols: "NR" to indicate that the task is not relevant to their job, or "RNT" to indicate that the task is relevant but they do not perform this task because they require further training. The following is an example of the instructions (as shown in Appendix E) that were provided to the participants taking part in this validation process.

QUESTION 1

Do you do this Task in your job?

If YES, circle the "Y" and go to QUESTION 2.1
If NO, circle the "N" and go to QUESTION 2.2

QUESTION 2.1

Where did you learn this Task?

Circle the appropriate response. Circle only ONE response.

P = Task learned prior to the job
O = Task learned on-the-job
S = Task learned during a seminar or
through a course after being employed in your job?

QUESTION 2.2

Which of the following statements describes why you do not perform this Task?

NR = the Task is not relevant to my job
RNT = the Task is relevant to my job, but I require additional training

Treatment of the Data

The data were analyzed by utilizing an Apple IIe computer, with a C/PM card, and using the Multi-Plan software package to produce a frequency count for the ranking of the skills and tasks from the POST charts. The responses from the abbreviated symbols on the POST charts were counted manually and converted to percentages. A more detailed description of the findings from the data are contained in Chapter 4 of this study.

Summary

This research study attempted to identify occupational classifications for optometric ancillary personnel. Two such occupational classifications were identified: one occupational classification for the Optometric Receptionist and the other occupational classification for the Optometric Assistant.

Chapter 4

FINDINGS OF THE STUDY

This chapter is divided into three sections. The first section contains the demographic information relevant to the Optometric Receptionists and Optometric Assistants who took part in the study. The second section presents skills and tasks performed on the job, and the third section the ranking of importance of skills and tasks.

Providing the Data

POST Charts 1 and 2 provided the data for Table 2 to 35, and the POST Charts 3 and 4 provided the data for Tables 36 to 69. All 4 POST Charts are in a pocket attached to the inside back cover of this thesis.

Reporting the Data

Fifty Percent: For the purposes of reporting the pecentage distribution data, responses totalling 50 percent and above were considered to be the "majority".

Twenty Percent: For the purposes of reporting the "need for training", responses totalling 20 percent and above were deemed to be tasks for which respondents required further training. The terms upper range, mid range and lower range were used to describe relative position of ranking of the tasks.

Tasks Acquired After Employment: In order to determine the tasks acquired by the majority of respondents after employment in an optometric office, the two columns "O: Learn Task On the Job" and "S: Learn Task at a Course" (on Tables 2 to 35) were added together for each task. The tasks totalling 50 percent and above were considered to be the "majority".

Section One: Distribution of Respondents

Table 1 indicates the location of respondents. Of the 59 Optometric Receptionists 33 (or 56%) worked in either Edmonton or Calgary. The remainder were scattered throughout the Province. Similarly, for the Optometric Assistants, 26 (or 53%) were from Edmonton or Calgary, while the remainder were scattered throughout the Province.

Section Two: Presentation of the Skills and Tasks Performed On The Job

Optometric Receptionists: Tables 2 to 15 summarize the findings from the POST Charts for the Optometric Receptionists.

Table 2, Skill A - Interpersonal Skills contains 11 tasks. All 11 tasks were performed by the majority of respondents. In the case of 10 tasks, a majority of respondents learned the task prior to entering the job. Only 1 task "Receive patients and office visitors" was learned on the job by the majority.

Table 3, Skill B - Dependability contains 5 tasks.

TABLE 1

THE REGIONAL DISTRIBUTION IN THE PROVINCE OF ALBERTA FOR PHASE II OF THE OPTOMETRIC RECEPTIONISTS AND THE OPTOMETRIC ASSISTANTS

	Optometric Receptionists	Optometric Assistants
Airdrie	1	1
Athabasca	1	1
Bonnyville	1	0
Calgary	14	10
Camrose	1	1
Drayton Valley	1	2
Edmonton	19	16
Fort Saskatchewan	2	0
Grande Prairie	1	1
Hanna	1	1
High Prairie	1	0
Lacombe	1	1
Lethbridge	5	3
Medicine Hat	0	1
Ponoka	1	2
Red Deer	4	4
Rocky Mountain House	1	1
St. Albert	0	1
St. Paul	1	1
Sherwood Park	1	1
Wetaskiwin	1	1
Total	59	49

TABLE 2

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC RECEPTIONIST

SKILL A: INTERPERSONAL SKILLS

TASK	N = 52	Y	P	O	S	N	NR	RNT
A - 1	Receive patient and office visitors	100	44	54	2	0	0	0
A - 2	Work independently	98	73	25	0	2	2	0
A - 3	Act in diplomatic manner	100	77	17	6	0	0	0
A - 4	Develop sensitivity to the needs of the patients	100	71	29	0	0	0	0
A - 5	Create a friendly and comfortable atmosphere	100	79	21	0	0	0	0
A - 6	Maintain effective working relationships to be part of a team	100	71	29	0	0	0	0
A - 7	Acquire a sense of humor	98	81	17	0	2	0	0
A - 8	Adapt to and deal with stress	98	62	33	2	2	2	2
A - 9	Identify situations under which you have no control	94	54	38	2	6	6	0
A - 10	Know when to start/ stop a conversation	100	75	23	2	0	0	0
A - 11	Don't be afraid to ask questions	100	79	19	2	0	0	0

Legend:

Y: Yes, perform task
P: Learned task prior to entering the job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 3

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC RECEPTIONIST

SKILL B: DEPENDABILITY

TASK	N = 52	Y	P	O	S	N	NR	RNT
B - 1	Adhere to work time schedule	100	81	19	0	0	0	0
B - 2	Project a professional appearance	100	81	19	0	0	0	0
B - 3	Keep patient's confidentiality	100	64	37	0	0	0	0
B - 4	Organize your work priorities	100	67	33	0	0	0	0
B - 5	Develop good listening habits	100	79	17	4	0	0	0

Legend:

Y: Yes, perform task
P: Learned task prior to entering the job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

All tasks were performed by the majority of respondents. In the case of all 5 tasks the majority of respondents learned them prior to entering the job.

Table 4, Skill C - Telephone Techniques contains 9 tasks. All tasks were performed by the majority of respondents. Four of the 9 tasks were learned by the majority of respondents prior to entering the job, while 5 tasks were learned on the job by the majority.

Table 5, Skill D - Appointment Management contains 7 tasks. All 7 tasks were performed by the majority of respondents. All 7 tasks were learned on the job by the majority.

Table 6, Skill E - Terminology contains 10 tasks. Nine of the tasks were performed by the majority of respondents. The remaining task "Maintain a dictionary of optometric terms" was however performed by 46% of the respondents. Eight of the tasks were learned on the job by the majority, while the need for training was reported in Task 1.

Table 7, Skill F - Order Optometric Frames and Lenses contains 8 tasks. All 8 tasks were performed by the majority of respondents, and all tasks were learned on the job by the majority of respondents.

Table 8, Skill G - Ordering Contact Lenses contains 9 tasks. All 9 tasks were performed by the majority of respondents, and all tasks were learned on the job by the

TABLE 4

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC RECEPTIONIST

SKILL C: TELEPHONE TECHNIQUES

TASK	N = 58	Y	P	O	S	N	NR	RNT
C - 1	Use acceptable telephone manners	100	81	19	0	0	0	0
C - 2	Identify caller in order to screen telephone calls	100	56	44	0	0	0	0
C - 3	Determine if you can assist this caller	100	46	54	0	0	0	0
C - 4	Be perceptive when screening calls, for example, know if it is an emergency	100	37	64	0	0	0	0
C - 5	Answer the telephone promptly	100	81	19	0	0	0	0
C - 6	Listen carefully, take notes and do not make the caller repeat the information	100	58	40	2	0	0	0
C - 7	Know how to deal with telephone shoppers	98	33	64	2	2	0	2
C - 8	Know how to handle telephone appointment cancellations	100	27	73	0	0	0	0
C - 9	Know how to use the telepone for recalls	67	15	50	2	33	29	4

Legend:

Y: Yes, perform task
P: Learned task prior to entering the job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 5

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC RECEPTIONIST

SKILL D: APPOINTMENT MANAGEMENT

TASK	N = 52	Y	P	O	S	N	NR	RNT
D - 1	Determine the patient's needs when making appointments	100	23	75	2	0	0	0
D - 2	Know the time required for the patient's appointment	100	15	85	0	0	0	0
D - 3	Know how to rearrange the appointment book in an emergency	100	19	87	0	0	0	0
D - 4	Telephone patients to confirm appointments for the next day	79	17	62	0	21	19	2
D - 5	Always obtain the patient's name and telephone number	98	26	72	0	2	2	0
D - 6	Find out if the patient is a new, referred or re-check	100	17	83	0	0	0	0
D - 7	Establish a waiting list for patients who can be fitted into cancelled appointments	87	17	69	0	13	13	0

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 6

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC RECEPTIONIST

SKILL E: TERMINOLOGY

TASK	N = 52	Y	P	O	S	N	NR	RNT
E - 1	Know the historical overview for the optometric profession	56	8	42	6	44	31	13
E - 2	Distinguish differences re: an optometrist, ophthalmologist and an optician	100	17	79	4	0	0	0
E - 3	Define the optometric services that your office provides	96	4	92	0	4	0	4
E - 4	Explain the fee structure for the office	98	4	94	0	2	2	0
E - 5	Know the names for the parts of a frame	88	6	82	0	12	6	6
E - 6	Know the different types of eye glass lenses	75	8	67	0	25	17	8
E - 7	Know the different types of contact lenses	81	6	75	0	19	8	13
E - 8	Know the different types of contact lens solutions	77	6	71	0	23	6	17
E - 9	Develop a vocabulary of terms relating to the anatomy of the eye	69	10	54	6	31	13	17
E - 10	Maintain a dictionary of optometric terms	46	4	35	8	54	33	21

Legend:

Y:	Yes, perform task	N:	No, do not perform the task
P:	Learned task prior to entering job	NR:	Not relevant
O:	Learned task on the job	RNT:	Task is relevant but need training
S:	Learned task at a course		

TABLE 7

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC RECEPTIONIST

SKILL F: ORDER OPHTHALMIC FRAMES AND LENSES

TASK	N = 52	Y	P	O	S	N	NR	RNT
F - 1	Know how to read a prescription from a patient's file	90	10	81	0	10	2	8
F - 2	Identify specifications for the frame parts	77	8	69	0	23	12	12
F - 3	Know which distributors and/or labs from which to order frames and lenses	77	8	69	0	23	12	12
F - 4	Perform minor repairs to frames	71	8	62	2	29	13	15
F - 5	Use a frame catalogue	87	6	81	0	13	10	3
F - 6	Know how to order parts of frames	88	8	71	0	12	9	3
F - 7	Know how to keep a record of your frame stock	75	8	67	0	25	12	13
F - 8	Know how to keep a record of all frame and lens orders	73	8	65	0	27	17	10

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 8

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC RECEPTIONIST

SKILL G: ORDERING CONTACT LENSES

TASK	N = 52	Y	P	O	S	N	NR	RNT
G - 1	Know how to read a patient's contact lens chart	73	4	69	0	27	10	17
G - 2	Be able to identify the type of contact lens from reading the patient's charts	77	4	73	0	23	8	15
G - 3	Know the contact lens companies replacement policy and delivery dates	73	4	69	0	27	12	15
G - 4	Keep a record of your contact lens stock	54	2	52	0	46	35	12
G - 5	Know how to care for contact lenses	73	2	71	0	27	12	15
G - 6	Known how to use contact lens solutions	71	6	65	0	29	15	13
G - 7	Keep a record of the dates for contact lens solutions	67	4	64	0	33	19	13
G - 8	Know how to order contact lens solutions	75	4	71	0	25	15	10
G - 9	Keep a record of all contact lens orders	73	6	67	0	27	15	12

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

majority of respondents.

Table 9, Skill H - Record Management contains 7 tasks. All 7 tasks were performed by the majority of respondents, and 5 of the 7 tasks were learned on the job by the majority of respondents.

Table 10, Skill I - General Office Procedures contains 4 tasks. All 4 tasks were performed by the majority of respondents, and all tasks were learned on the job by the majority of respondents.

Table 11, Skill J - Typing contains 5 tasks. All 5 tasks were performed by the majority of respondents, and 3 of the 5 tasks were learned on the job by the majority of respondents.

Table 12, Skill K - Accounting contains 12 tasks. Nine tasks were performed by the majority of respondents, and 4 tasks were learned on the job by the majority of respondents. The remaining 3 tasks "Process the office's payroll", "Prepare a balance sheet" and "Prepare an income statement" were reported not relevant by the majority of respondents.

Table 13, Skill L - Use and Operate Business Machines contains 7 tasks. The majority of respondents performed 2 tasks. One task "Use a Calculator" was learned prior to entering the job by the majority of respondents. The 5 remaining tasks were reported not relevant by the majority of respondents.

TABLE 9

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC RECEPTIONIST

SKILL H: RECORD MANAGEMENT

TASK	N = 52	Y	P	O	S	N	NR	RNT
H - 1	Understand and compare different filing systems	66	37	29	0	34	26	8
H - 2	Set up an appropriate filing system for the office	75	27	48	0	25	21	4
H - 3	Know how to correctly file and retrieve files from the filing system	100	38	60	2	0	0	0
H - 4	Know how to find a lost file within the filing system	98	23	75	0	2	2	2
H - 5	Prepare charts for new patients, regular eye exams, contact lenses and/or visual training	100	8	92	0	0	0	0
H - 6	Prepare doctor's day sheet	75	10	65	0	25	25	0
H - 7	Maintain an up-to-date filing system by purging the files on a regular basis	94	31	64	0	6	2	4

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 10

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC RECEPTIONIST

SKILL I: GENERAL OFFICE PROCEDURES

TASK	N = 52	Y	P	O	S	N	NR	RNT
I - 1	Process and deal with goods received from courier service (lab deliveries)	96	21	75	0	4	4	0
I - 2	Process incoming mail	96	40	56	0	4	4	0
I - 3	Know which are the best courier services for your office	88	12	77	0	12	12	0
I - 4	Know the mailing procedures used by your office, for example, C.O.D. parcel post, registered mail	98	22	76	0	2	0	2

Legend:

Y:	Yes, perform task	N:	No, do not perform the task
P:	Learned task prior to entering job	NR:	Not relevant
O:	Learned task on the job	RNT:	Task is relevant but need training
S:	Learned task at a course		

TABLE 11

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIST RECEPTIONIST

SKILL J: TYPING

TASK	N = 52	Y	P	O	S	N	NR	RNT
J - 1	Type the Alberta Health Care forms	92	4	88	0	8	8	0
J - 2	Type statements (Accounts Payable)	73	27	46	0	27	27	0
J - 3	Type recall cards	83	4	79	0	17	17	0
J - 4	Type referral letters to other practitioners	77	17	60	0	23	19	4
J - 5	Type memos	62	33	29	0	38	34	4

Legend:

Y:	Yes, perform task	N:	No, do not perform the task
P:	Learned task prior to entering job	NR:	Not relevant
O:	Learned task on the job	RNT:	Task is relevant but need training
S:	Learned task at a course		

TABLE 12

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC RECEPTIONIST

SKILL K: ACCOUNTING

TASK	N = 52	Y	P	O	S	N	NR	RNT
K - 1	Know how to collect fees	98	46	52	0	2	2	0
K - 2	Know how to collect bad debts	84	42	42	0	16	9	7
K - 3	Process the office's banking procedures	79	27	52	0	21	19	2
K - 4	Record the office's accounts receivable	98	33	65	0	2	0	2
K - 5	Understand how to fill out 3rd party payments, such as: A.H.C., Social Assistance, etc.	93	10	83	0	7	7	0
K - 6	Record and pay the office's accounts payable	52	14	38	0	48	42	6
K - 7	Record and balance the petty cash	81	35	46	0	19	17	2
K - 8	Process the office's payroll, for example: UIC, Income Tax, C.C.P., etc.	35	10	25	0	64	62	3
K - 9	Know what the cash float is and know how to keep it balanced	74	31	44	0	26	23	3
K - 10	Post to the general ledger and keep it balanced	54	17	37	0	46	42	4
K - 11	Prepare a balance sheet	44	17	27	0	56	50	6

TABLE 12 (continued)

TASK	N = 52	Y	P	O	S	N	NR	RNT
K - 12	Prepare an income statement	15	6	8	1	85	75	10

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
NRT: Task is relevant but need training

TABLE 13

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC RECEPTIONIST

SKILL L: USE AND OPERATE BUSINESS MACHINES

TASK	N = 52	Y	P	O	S	N	NR	RNT
L - 1	Use a calculator	94	75	17	2	6	6	0
L - 2	Use a telephone answering machine	48	17	31	0	52	52	0
L - 3	Utilize a dictaphone	15	10	6	0	85	79	6
L - 4	Operate a postage meter	29	15	13	0	71	67	4
L - 5	Operate a cheque writer	17	10	6	0	83	77	6
L - 6	Operate a photocopier	56	38	17	0	44	38	6
L - 7	Use and operate a computer	10	4	6	0	90	83	7

Legend:

Y:	Yes, perform task	N:	No, do not perform the task
P:	Learned task prior to entering job	NR.	Not relevant
O:	Learned task on the job	RNT:	Task is relevant but need training
S:	Learned task at a course		

Table 14, Skill M - Inner Office Maintenance contains 8 tasks. All 8 tasks were performed by the majority of respondents. Four of the 8 tasks were learned by the majority of respondents prior to entering the job, while 3 tasks were learned on the job by the majority.

Table 15, Skill N - Writing Competencies contains 6 tasks. All 6 tasks were performed by the majority, and all 6 tasks were learned prior to the job by the majority of respondents.

Optometric Assistants: Table 16 to 33 summarize the findings from the POST Charts for Optometric Assistants.

Table 16, Skill A - Terminology contains 5 tasks. All 5 tasks were performed by the majority of respondents. In this case, all 5 tasks were learned by the majority after entering the job. Two tasks were learned on the job, while 3 tasks were learned through courses, seminars or workshops..

Table 17, Skill B - Interpersonal Skills contains 11 tasks. All 11 tasks were performed by the majority of respondents. In the case of 6 tasks the majority of respondents learned them prior to entering the job, while 3 tasks were learned on the job by the majority of respondents.

Table 18, Skill C - Handle Telephone Shoppers contains 5 tasks. All 5 tasks were performed by the majority of respondents. All 5 tasks were learned by the majority after entering the job. Four tasks were learned on the job, while 1 task was learned through courses, seminars, or

TABLE 14

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC RECEPTIONIST

SKILL M: INNER OFFICE MAINTENANCE

TASK	N = 52	Y	P	O	S	N	NR	RNT
M - 1	Maintain a clean and tidy waiting room	96	71	25	0	4	4	0
M - 2	Keep the office equipment in good working order	81	38	42	0	19	17	2
M - 3	Keep your doctor's equipment clean	87	13	73	0	13	12	2
M - 4	Order printing supplies , office stationery, etc.	94	33	62	0	6	6	0
M - 5	Order technical supplies	63	6	58	0	37	35	2
M - 6	Water the plants regularly	75	60	15	0	25	25	0
M - 7	Know how to make coffee	67	58	10	0	33	33	0
M - 8	Order office supplies, e.g., soap, towels, magazines, coffee	87	56	31	0	13	13	0

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 15

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC RECEPTIONIST

SKILL N: WRITING COMPETENCIES

TASK	N = 52	Y	P	O	S	N	NR	RNT
N - 1	Compose a simple business letter	92	85	6	2	8	8	0
N - 2	Use proper grammar	98	88	10	0	2	2	0
N - 3	Use proper spelling	98	90	8	0	2	2	0
N - 4	Use proper punctuation	98	88	8	2	2	2	0
N - 5	Understand what you have written	98	79	19	0	2	2	0
N - 6	Proofread your work	96	87	8	2	4	4	0

Legend:

Y:	Yes, perform task	N:	No, do not perform the task
P:	Learned task prior to entering job	NR:	Not relevant
O:	Learned task on the job	RNT:	Task is relevant but need training
S:	Learned task at a course		

TABLE 16

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL A: TERMINOLOGY

TASK	N = 38	Y	P	O	S	N	NR	RNT
A - 1	Anatomy: Describe how the eye is structured and be able to identify the major parts of an eye	66	16	29	21	34	21	13
A - 2	Physiology: Describe how the eye and parts basically function	63	10	29	24	37	24	13
A - 3	Definitions: Define and understand common terms that relate to the eye and vision	76	8	53	15	24	11	13
A - 4	Understand enough terminology relating to the eye to distinguish a sign from a symptom	63	8	47	8	37	24	13
A - 5	Recognize the basic function of ophthalmic equipment	72	11	53	8	28	12	16

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 17

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL B: INTERPERSONAL SKILLS

TASK	N = 38	Y	P	O	S	N	NR	RNT
B - 1	Maintain effective working relationships with co-worker(s), patient(s) and doctor(s)	100	71	29	0	0	0	0
B - 2	Develop sensitivity to the needs of patients	100	58	42	0	0	0	0
B - 3	Act in a diplomatic manner	100	76	21	3	0	0	0
B - 4	Create a friendly and comfortable atmosphere	100	71	21	8	0	0	0
B - 5	Be selective with what you say to a patient and know your legal limits	95	29	61	5	5	2	3
B - 6	Develop communication competencies	97	64	28	5	3	0	3
B - 7	Be a good listener	95	71	16	8	5	2	3
B - 8	Explain the advantages and services provided by an optometric office	95	13	79	3	5	2	3
B - 9	Describe the fee structure that is applied in your office	92	5	87	0	8	3	5
B - 10	Be able to troubleshoot ophthalmic appliance problems	55	8	42	5	45	29	16
B - 11	Develop good salesmanship techniques	79	32	42	5	21	11	11

Legend:
Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT Task is relevant but need training

TABLE 18

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL C: HANDLE TELEPHONE SHOPPERS

TASK	N =38	Y	P	O	S	N	NR	RNT
C - 1	Keep conversation general when dealing with telephone shoppers	89	21	68	0	11	3	8
C - 2	Know how to limit the questions and answers when dealing with a telephone shopper	84	26	55	3	16	8	8
C - 3	Be non-committal regarding fees when dealing with a telephone shopper	76	13	55	8	24	18	6
C - 4	Secure the telephone shopper's name and phone number (sometimes address in order to mail them information)	71	21	45	5	29	18	11
C - 5	Direct the telephone shopper into the office in order to further answer their specific questions	95	16	71	8	5	2	3

Legend:

Y:	Yes, perform task	N:	No, do not perform the task
P:	Learned task prior to entering job	NR:	Not relevant
O:	Learned task on the job	RNT:	Task is relevant but need training
S:	Learned task at a course		

workshops.

Table 19, Skill D - Education for Assistants contains 10 tasks. Five tasks were performed by the majority of respondents. Two tasks were learned by the majority after entering the job. One task was learned on the job, while 1 task was learned through courses, seminars, or workshops. The need for training was reported in 8 of the 10 tasks.

Table 20, Skill E - Patient Education contains 9 tasks. Eight of the 9 tasks were performed by the majority of respondents, and 8 tasks were learned on the job by the majority. The need for training was reported in 1 task.

Table 21, Skill F - Lens Selection contains 9 tasks. All 9 tasks were performed by the majority of respondents. All tasks were learned by the majority after entering the job. Eight tasks were learned on the job, while 1 task was learned through courses, seminars, or workshops. The need for training was reported in 2 tasks.

Table 22, Skill G - Frame Selection contains 11 tasks. All 11 tasks were performed by the majority of respondents, and all tasks were learned by the majority after entering the job. Ten tasks were learned on the job, while 1 task was learned through courses, seminars, or workshops.

Table 23, Skill H - Ordering from Labs contains 4 tasks. All 4 tasks were performed by the majority of respondents, and all tasks were learned on the job by the majority.

TABLE 19

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL D: EDUCATION FOR ASSISTANTS

TASK	N = 38	Y	P	O	S	N	NR	RNT
D - 1	Courses in communication skills	68	48	1	19	32	16	16
D - 2	Office management training courses	50	19	13	18	50	24	26
D - 3	Seminars/courses to update knowledge and technology in the field	61	5	16	39	39	13	26
D - 4	Keep up with new product knowledge	82	3	55	24	18	5	13
D - 5	Courses in time management	39	11	13	15	71	24	27
D - 6	Assertive training	34	13	13	8	66	30	36
D - 7	Stress management courses	32	13	3	16	68	32	36
D - 8	Courses in basic behavioral psychology	34	18	0	16	66	34	32
D - 9	Courses regarding first aid	45	32	3	11	55	18	37
D - 10	Record management courses (filing systems)	58	29	24	5	42	18	24

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 20

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL E: PATIENT EDUCATION

TASKS	N = 38	Y	P	O	S	N	NR	RNT
E - 1	Educate patients about the services available in the office	100	5	95	0	0	0	0
E - 2	Explain how third party billing functions, for example, A.H.C., Social Services, etc.	100	8	92	0	0	0	0
E - 3	Advise patients about the types of lenses and frames available	97	5	87	5	3	3	0
E - 4	When dealing with a patient's question, understand the legality of your statements	82	11	63	8	18	3	16
E - 5	When referrals to other health care offices and/or hospitals give patient information	76	5	68	3	24	11	0
E - 6	Explain the importance of regular eye examinations	100	8	89	3	0	0	0
E - 7	Educate patients on how to care for ophthalmic appliances	76	11	61	5	24	13	11
E - 8	Give patients instructions regarding low vision aids	45	3	39	3	55	32	24

TABLE 20 (continued)

TASK	N = 38	Y	P	O	S	N	NR	RNT
E - 9	Educate the patients on the merits of having a spare pair of eyeglasses	97	8	78	11	3	3	0

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 21

PERCENTAGE DISTRIBUTION FOR THE TASKS
PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL F: LENS SELECTION

TASK	N = 38	Y	P	O	S	N	NR	RNT
F - 1	Know how to read and understand the meaning of a prescription from patient's chart	89	8	74	7	11	3	8
F - 2	Know how lenses are manufactured and the time required for each stage of development	68	11	49	8	32	11	21
F - 3	Know the materials from which lenses are made	87	5	66	16	13	3	10
F - 4	Be able to analyze lenses using a lens-meter and a lens clock	74	5	58	11	26	11	15
F - 5	Understand the function of parts of a lens, for example, sphere, cylinder, prism	71	3	55	13	29	5	24
F - 6	Know the types of single and multi-vision lenses	89	5	79	5	11	3	8
F - 7	Know the availability of lenses	82	2	80	0	18	7	11
F - 8	Know how the warranty applies to lenses, for example, Hardex lenses	84	5	79	0	16	8	8
F - 9	Know lens finishes, for example, tints, coatings etc.	87	5	79	3	13	5	8

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 22

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL G: FRAME SELECTION

TASK	N = 38	Y	P	O	S	N	NR	RNT
G - 1	Conceptualize the prescription when selecting a frame for the patients	89	5	81	3	11	3	8
G - 2	Determine the size of frame for the patient, for example, bridge, eye size, temple length	82	5	69	8	18	5	13
G - 3	Understand the cosmetics of frame selection	89	10	71	8	11	3	8
G - 4	Know the materials and construction of the frame	84	5	66	13	16	5	11
G - 5	Know the manufacturers of the frames	95	6	89	0	5	2	3
G - 6	Know the availability of the frames	97	3	94	0	3	3	0
G - 7	Know the courier services available from the labs	84	5	79	0	16	5	11
G - 8	Be able to read the frame manufacturer's catalogue in order to select the proper size, color, etc., of frame	97	5	92	0	3	3	0
G - 9	Know how to take patient's pupillary distance and be able to calculate their near P.D.	71	8	50	13	29	16	13

TABLE 22 (continued)

TASK	N = 38	Y	P	O	S	N	NR	RNT
G - 10	Be able to measure a patient's bifocal height	60	8	47	5	40	24	16
G - 11	Know the frame and lens fee structure for the office	89	0	89	0	11	3	8

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 23

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL H: ORDERING FROM LABS

TASK	N = 38	Y	P	O	S	N	NR	RNT
H - 1	Know how to read the prescription, lens and frame selection on a patient's chart	97	8	84	5	3	3	0
H - 2	Know how to order using lab forms	97	8	89	0	3	3	0
H - 3	Know which lab/ manufacturer from which to get the desired products	89	5	84	0	11	5	4
H - 4	Know how long it takes to get an order from the labs/manufacturers	95	8	87	0	5	5	5

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

Table 24, Skill I - Frame Fitting (Dispensing) contains 6 tasks. All 6 tasks were performed by the majority of respondents, and all tasks were learned on the job by the majority.

Table 25, Skill J - Repairing and Adjustments contains 6 tasks. All 6 tasks were performed by the majority of respondents. All tasks were learned by the majority after entering the job. Five tasks were learned on the job, while 1 task was learned through courses, seminars, or workshops. The need for training was reported in one task.

Table 26, Skill K - Purchasing contains 6 tasks. All six tasks were performed by the majority of respondents, and all tasks were learned on the job by the majority. The need for training was reported in 3 tasks.

Table 27, Skill L - Order Contact Lenses from Labs contains 4 tasks. All 4 tasks were performed by the majority of respondents, and all tasks were learned on the job by the majority.

Table 28, Skill M - Contact Lens Dispensing contains 9 tasks. Seven of the 9 tasks were performed by the majority of respondents, and 7 tasks were learned on the job by the majority. The need for training was reported in 4 tasks.

Table 29, Skill N - Visual Training contains 7 tasks. No tasks were performed by the majority of respondents. The need for training was reported in all 7 tasks.

Table 30, Skill O - Preliminary Screening contains 8

TABLE 24

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL I: FRAME FITTING (DISPENSING)

TASK	N = 38	Y	P	O	S	N	NR	RNT
I - 1	Verify that the prescriptions ordered from the lab have been fabricated correctly	76	8	63	5	24	8	16
I - 2	Dispense the frame to the patient	82	5	74	3	18	5	13
1 - 3	Advise the patient on adaptation to new lenses	76	5	68	3	24	6	18
1 - 4	Instruct the patient on the use and care of new prescription	89	7	71	11	11	6	5
I - 5	Offer reassurance and positive reinforcement	97	8	87	2	3	3	0
I - 6	Give patients advice regarding follow-up care when necessary	97	5	92	0	3	3	0

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 25

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL J: REPAIRING AND ADJUSTMENTS

TASK	N = 38	Y	P	O	S	N	NR	RNT
J - 1	Have knowledge of frame names and frame parts	92	6	83	3	8	3	5
J - 2	Know when not to adjust a frame	79	5	71	3	21	5	16
J - 3	Be able to improvise with temporary repairs	84	8	74	2	16	5	11
J - 4	Know the product availability	84	5	80	0	16	5	11
J - 5	Know when to advise patients that they are due for an eye exam rather than repair an existing out-dated prescription in an old frame	97	5	92	0	3	3	0
J - 6	Know how to customize frames when possible	55	3	45	7	45	21	24

Legend:

Y:	Yes, perform task	N:	No, do not perform the task
P:	Learned task prior to entering job	NR:	Not relevant
O:	Learned task on the job	RNT:	Task is relevant but need training
S:	Learned task at a course		

TABLE 26

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL K: PURCHASING

TASK	N = 38	Y	P	O	S	N	NR	RNT
K - 1	Be familiar with various discount systems, for example, bulk purchasing and discounts on lab bills	63	5	58	0	37	21	16
K - 2	Be familiar with return policy and guarantees on frames	82	6	76	0	18	8	11
K - 3	Know the warranty on lenses	84	3	81	0	16	5	11
K - 4	Know the laboratory warranty on contact lenses	63	0	63	0	37	13	24
K - 5	Know the laboratory return policy on contact lenses	68	0	68	0	32	11	21
K - 6	Know the supplier's return policy on contact lens solutions	58	0	58	0	42	21	21

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 27

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL L: ORDER CONTACT LENSES FROM LABS

TASK	N = 38	Y	P	O	S	N	NR	RNT
L - 1	Know and understand the prescription from a patient's contact lens chart	82	3	74	5	18	5	13
L - 2	Know which lab to order a specific type of contact lens	74	0	74	0	26	10	16
L - 3	Know the office's fee structure regarding new contact lens patients	82	0	82	0	18	7	11
L - 4	Know the office's fee structure regarding patient's contact lens replacement	82	0	82	0	18	5	13

Legend:

Y:	Yes, perform task	N:	No, do not perform the task
P:	Learned task prior to entering job	NR:	Not relevant
O:	Learned task on the job	RNT:	Task is relevant but need training
S:	Learned task at a course		

TABLE 28

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL M: CONTACT LENS DISPENSING

TASK	N = 38	Y	P	O	S	N	NR	RNT
M - 1	Verify that the contact lens prescription from the lab is correct	37	3	31	3	63	32	31
M - 2	Deal with patient's concerns regarding the misinformation they may have about contact lenses	78	3	73	3	21	5	16
M - 3	Be able to perform correctly the insertion and removal techniques for contact lenses	61	3	53	5	39	18	21
M - 4	Know contact lens maintenance	76	5	68	3	24	5	18
M - 5	Know which solutions to use for the care of contact lenses	68	2	66	0	32	11	21
M - 6	Make certain that the patient understands the wearing schedule	74	0	74	0	26	13	13
M - 7	Make certain that the patients understand the importance of follow-up care and rechecks	82	2	80	0	18	7	11
M - 8	When it applies, advise patients about contact lens warranties	66	3	63	0	34	34	0
M - 9	Be able to make minor adjustments to hard contact lenses	7	0	2	5	93	58	35

Legend:
Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 29

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL N: VISUAL TRAINING

TASK	N = 38	Y	P	O	S	N	NR	RNT
N - 1	Understanding basic terminology	47	3	39	5	53	19	34
N - 2	Administer health history questionnaire	32	0	32	0	68	32	36
N - 3	Understand basic visual training equipment	26	0	26	0	74	32	42
N - 4	Understand visual training techniques	32	0	29	3	68	26	42
N - 5	Know how to use visual training equipment	34	0	32	2	66	32	34
N - 6	Motivate the patient to maintain visual training therapy	32	0	29	3	68	29	39
N - 7	Maintain patient's visual training progress charts for the doctor	29	0	29	0	71	37	34

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 30

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL O: PRELIMINARY SCREENING

TASK	N = 38	Y	P	O	S	N	NR	RNT
O - 1	Understand why you pre-test	50	5	45	0	50	16	34
O - 2	Filling out patient's cards, re: history	63	5	55	3	37	8	29
O - 3	Check uncorrected or unaided visual acuity	32	0	29	3	68	34	34
O - 4	Be able to use a tonometer	45	0	45	0	55	37	18
O - 5	Check patient for color vision defects	37	0	37	0	63	29	34
O - 6	Perform field testing	29	0	29	0	71	29	42
O - 7	Check for binocular vision	26	0	26	0	74	29	45
O - 8	Take blood pressure readings	29	3	26	0	71	34	37

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

tasks. Two of the 8 tasks were performed by the majority. One task was learned on the job by the majority, while the need for training was reported in 7 tasks.

Table 31, Skill P - Cost Analysis for the Finished Product contains 5 tasks. All 5 tasks were performed by the majority of respondents, and all tasks were learned on the job by the majority.

Table 32, Skill Q - Financial Statements contains 3 tasks. No tasks were performed by the majority. Although all tasks were found not to be relevant by the majority of respondents, the need for training was reported in all three tasks.

Table 33, Skill R - Math contains 4 tasks. All 4 tasks were performed by the majority of respondents. Three of the tasks were learned prior to entering the job by the majority of respondents.

A Summary of Section Two

Table 34, A Summary of Tables 2 to 15 shows that of 14 skills containing 108 tasks, 30 (or 27%) of the tasks were learned by the majority of respondents "prior to entering the job", while 57 (or 53%) of the tasks were learned by the majority of respondents "on the job". The majority of respondents did not perform 9 of the 108 tasks. The need for further training for the Optometric Receptionists was indicated in 1 task only.

TABLE 31

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL P: COST ANALYSIS FOR THE FINISHED PRODUCT

TASK	N = 38	Y	P	O	S	N	NR	RNT
P - 1	Cost for lenses	84	4	80	0	16	5	11
P - 2	Cost for frames	87	5	82	0	13	8	5
P - 3	Be aware of the current market fees within the industry	79	5	71	3	21	13	8
P - 4	Know your office's dispensing fees	95	0	95	0	5	3	2
P - 5	Understand your office's referral fees	53	0	53	0	47	42	5

Legend:

Y:	Yes, perform task	N:	No, do not perform the task
P:	Learned task prior to entering job	NR:	Not relevant
O:	Learned task on the job	RNT:	Task is relevant but need training
S:	Learned task at a course		

TABLE 32

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL Q: FINANCIAL STATEMENTS

TASK	N = 38	Y	P	O	S	N	NR	RNT
Q - 1	Analyze financial statements in order to make office projection decisions	23	5	18	0	76	53	24
Q - 2	Be able to do cost accounting, for example, cost-volume-profit analysis	24	5	16	3	76	53	24
Q - 3	Understand tax considerations in business decisions	20	3	16	1	80	56	24

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 33

PERCENTAGE DISTRIBUTION FOR THE TASKS PERFORMED BY AN OPTOMETRIC ASSISTANT

SKILL R: MATH

TASK	N = 38	Y	P	O	S	N	NR	RNT
R - 1	Perform basic mathematical operations	97	85	10	2	3	3	0
R - 2	Understand basic principles of algebra	79	72	2	5	21	13	8
R - 3	Compute with dollars and cents	95	85	10	0	5	5	0
R - 4	Calculate weights and measures	63	40	18	5	37	32	5

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 34

A Summary of Tables 2 to 15 for an Optometric Receptionist

N = 52

TABLES	NUMBER OF TASKS	Y	P	O	S	N	NR	RNT
2	11	11	10	1	0	0	0	0
3	5	5	5	0	0	0	0	0
4	9	9	4	5	0	0	0	0
5	7	7	0	7	0	0	0	0
6	10	9	0	8	0	1	0	1
7	8	8	0	8	0	0	0	0
8	9	9	0	9	0	0	0	0
9	7	7	0	5	0	0	0	0
10	4	4	0	4	0	0	0	0
11	5	5	0	3	0	0	0	0
12	12	9	0	4	0	3	3	0
13	7	2	1	0	0	5	5	0
14	8	8	4	3	0	0	0	0
15	6	6	6	0	0	0	0	0
TOTALS	108	99	30	57	0	9	8	1

Legend:

Y: Yes, performed task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

Table 35, A Summary of Tables 16 to 33, shows that of the 18 skills containing 122 tasks, 9 (or 7%) of the tasks were learned by the majority of respondents "prior to entering the job", while 82 (or 67%) of the tasks were learned by the majority of respondents "on the job". The majority of respondents did not perform 24 (or 20%) of the 122 tasks. The need for further training for the Optometric Assistants was indicated in 36 (or 30%) of the tasks.

Section Three: Skills and Tasks in Rank Order as Perceived by Optometric Ancillary Personnel

Section three describes the rank order of relative importance of the skills and tasks performed by Optometric Receptionists and Optometric Assistants as perceived by them. In addition, this section describes which of the tasks ranked in order of relative importance are associated with training needs for both the Optometric Receptionists and the Optometric Assistants. The training needs were based on responses of 20 percent and above.

Table 36, Skills for an Optometric Receptionist, shows 14 skills ranked in relative importance as perceived in rank order by Optometric Receptionists.

Table 37, shows the ranked order, in relative importance, of 11 tasks for the skill "Interpersonal Skills" performed by and perceived in rank order by the Optometric Receptionist, and indicates no need for further training.

Table 38, shows the ranked order, in relative

TABLE 35

A Summary of Tables 16 to 33 for an Optometric Assistant

N = 38

TABLE	NUMBER OF TASKS	Y	P	O	S	N	NR	RNT
16	5	5	0	2	3	0	0	0
17	11	11	6	3	0	0	0	0
18	5	5	0	4	1	0	0	0
19	10	5	0	1	1	5	0	8
20	9	8	0	8	0	1	0	1
21	9	9	0	8	1	0	0	2
22	11	11	0	10	1	0	0	0
23	4	4	0	4	0	0	0	0
24	6	6	0	6	0	0	0	0
25	6	6	0	5	1	0	0	1
26	6	6	0	6	0	0	0	3
27	4	4	0	4	0	0	0	0
28	9	7	0	7	0	2	0	4
29	7	0	0	0	0	7	0	7
30	8	2	0	1	0	6	0	7
31	5	5	0	5	0	0	0	0
32	3	0	0	0	0	3	0	3
33	4	4	3	0	0	0	0	0
TOTALS	122	98	9	74	8	24	0	36

Legend:

Y: Yes, perform task
P: Learned task prior to entering job
O: Learned task on the job
S: Learned task at a course
N: No, do not perform the task
NR: Not relevant
RNT: Task is relevant but need training

TABLE 36

Relative Importance of Skills: Optometric Receptionist

N = 52

Rank	Skills
1	Interpersonal Skills
2	Dependability
3	Telephone Techniques
4	Appointment Management
5	Terminology
6	Record Management
7	Accounting
8	General Office Procedures
9	Typing
10	Writing Skills
11	Inner Office Maintenance
12	Ordering Contact Lenses
13	Order Ophthalmic Frames & Lenses
14	Use & Operate Business Machines

TABLE 37

Relative Importance of Tasks for Interpersonal Skills as Associated with Training Needs: Optometric Receptionist

N = 52

Rank	Task	Percentage Requiring Training
1	Receive Patients and Office Visitors	0
2	Maintain effective working relationships, be part of a team	0
3	Create a friendly and comfortable atmosphere	0
4	Develop sensitivity to the needs of the patients	0
5	Work independently	0
6	Act in a diplomatic manner	0
7	Acquire a sense of humour	0
8	Adapt to and deal with stress	2
9	Identify situations under which you have no control	0
10	Know when to start/stop a conversation	0
11	Don't be afraid to ask questions	0

TABLE 38

Relative Importance of Tasks for the Skill - Dependability as Associated with Training Needs: Optometric Receptionist

N = 52

Rank	Task	Percentage Requiring Training
1	Project a professional appearance	0
2	Adhere to work time schedule	0
3	Keep patients' confidentiality	0
4	Organize your work priorities	0
5	Develop good listening habits	0

importance, of 5 tasks for the skill "Dependability" performed by and perceived in rank order by the Optometric Receptionist, and indicates no need for further training.

Table 39, shows the ranked order, in relative importance, of 9 tasks for the skills "Telephone" performed by and perceived in rank order by the Optometric Receptionist, and indicates no need for further training.

Table 40, shows the ranked order, in relative importance, of 7 tasks for the skill "Appointment Management" performed by and perceived in rank order by the Optometric Receptionist, and indicates no need for further training.

Table 41, shows the ranked order, in relative importance, of 10 tasks for the skill "Terminology" performed by and perceived in rank order by the Optometric Receptionist, and indicates the need for further training in 1 task in the lower range.

Table 42, shows the ranked order, in relative importance, of 7 tasks for the skill "Record Management" performed by and perceived in rank order by the Optometric Receptionist, and indicates no need for further training.

Table 43, shows the ranked order, in relative importance, of 12 tasks for the skill "Accounting" performed by and perceived in rank order by the Optometric Receptionist, and indicates no need for further training.

Table 44, shows the ranked order, in relative

TABLE 39

Relative Importance of Tasks for the Skill - Telephone as Associated with Training Needs: Optometric Receptionist

N = 52

Rank	Task	Percentage Requiring Training
1	Use acceptable telephone manners	0
2	Determine if you can assist this caller	0
3	Be perceptive when screening telephone, e.g., know if it is an emergency	0
4	Answer the telephone promptly	0
5	Identify caller in order to screen telephone calls	0
6	Listen carefully, take notes and do not make the caller repeat the information	0
7	Know how to handle telephone appointment cancellations	2
8	Know how to deal with telephone shoppers	0
9	Know how to use the telephone for recalls	4

TABLE 40

Relative Importance of Tasks for the Skill - Appointment Management as Associated with Training Needs: Optometric Receptionist

N = 52

Rank	Task	Percentage Requiring Training
1	Determine the patient's needs when they are making appointments	0
2	Know the time required for the patient's appointments	0
3	Always obtain the patient's name and telephone number	0
4	Find out if the patient is a new, referred or re-check	0
5	Know how to re-arrange the appointment book in an emergency	0
6	Telephone patients to confirm appointments for the next day	2
7	Establish a waiting list for patients who can be fitted into cancelled appointments	0

TABLE 41

Relative Importance of Tasks for the Skill - Terminology as Associated with Training Needs: Optometric Receptionist

N = 52

Rank	Task	Percentage Requiring Training
1	Define the optometric services that your office provides	4
2	Explain the fee structure for your office	0
3	Distinguish differences re: Optometrist, Ophthalmologist and an Optician	4
4	Know the names for the parts of a frame	6
5	Know the different types of eyeglass lenses	8
6	Know the different types of contact lenses	13
7	Know the different types of contact lens solutions	17
8	Develop a vocabulary of terms relating to the anatomy of the eye	17
9	Maintain a dictionary of optometric terms	21
10	Know the historical overview for the optometric profession	13

TABLE 42

Relative Importance of Tasks for the
Skill - Record Management
as Associated with Training Needs:
Optometric Receptionist

N = 52

Rank	Task	Percentage Requiring Training
1	Prepare charts for new patients, regular eye exams, contact lenses and/or visual training	0
2	Set up an appropriate filing system for your office	4
3	Know how to correctly file and retrieve files from your system	0
4	Know how to find a lost file within your system	2
5	Prepare doctor's day sheet	0
6	Maintain an up-to-date filing system by purging your files on a regular basis	4
7	Understand and compare different filing systems	8

TABLE 43

Relative Importance of Tasks for the
Skill - Accounting
as Associated with Training Needs
Optometric Receptionist

N = 52

Rank	Task	Percentage Requiring Training
1	Know how to collect fees	0
2	Know how to collect bad debts	7
3	Record your office's accounts receivable	2
4	Understand how to fill out third party payments, such as: A.H.C., Social Assistance, etc.	0
5	Process your office's banking procedures	2
6	Record and pay your office's accounts payable	6
7	Know what your cash float is and know how to keep it balanced	3
8	Record and balance your petty cash	2
9	Post to your general ledger and keep it balanced	4
10	Prepare a balance sheet	6
11	Process your office's payroll, for example: UIC, income tax, C.P.P., etc.	3
12	Prepare an income statement	10

TABLE 44

Relative Importance of Tasks for the Skill - General Office Procedures as Associated with Training Needs: Optometric Receptionist

n = 52

Rank	Task	Percentage Requiring Training
1	Process and deal with goods received from courier service (lab deliveries)	0
2	Process incoming mail	0
3	Know which are the best courier services for your office	0
4	Know the mailing procedures used by your office, for example: C.O.D., parcel post, registered mail	2

importance, of 4 tasks for the skill "General Office Procedures" performed by and perceived in rank order by the Optometric Receptionist, and indicates no need for further training.

Table 45, shows the ranked order, in relative importance, of 5 tasks for the skill "Typing" performed by and perceived in rank order by the Optometric Receptionist, and indicates no need for further training.

Table 46, shows the ranked order, in relative importance, of 6 tasks for the skill "Writing Skills" performed by and perceived in rank order by the Optometric Receptionist, and indicates no need for further training.

Table 47, shows the ranked order, in relative importance, of 8 tasks for the skill "Inner Office Maintenance" performed by and perceived in rank order by the Optometric Receptionist, and indicates no need for further training.

Table 48, shows the ranked order, in relative importance, of 9 tasks for the skill "Ordering Contact Lenses" performed by and perceived in rank order by the Optometric Receptionist, and indicates no need for further training.

Table 49, shows the ranked order, in relative importance, of 8 tasks for the skill "Ordering Ophthalmic Frames and Lenses" performed by and perceived in rank order by the Optometric Receptionist, and indicates no need for

TABLE 45

Relative Importance of Tasks for the Skill - Typing as Associated with Training Needs: Optometric Receptionist

N = 52

Rank	Task	Percentage Requiring Training
1	Type the Alberta Health Care forms	0
2	Type statements (Accounts Payable)	0
3	Type recall cards	0
4	Type referral letters to other practitioners	4
5	Type memos	4

TABLE 46

Relative Importance of Tasks for the Skill - Writing Skills as Associated with Training Needs: Optometric Receptionist

N = 52

Rank	Task	Percentage Requiring Training
1	Compose a simple business letter	0
2	Use proper grammar	0
3	Use proper spelling	0
4	Use proper punctuation	0
5	Understand what you have written	0
6	Proofread your work	0

TABLE 47

Relative Importance of Tasks for the
Skill - Inner Office Maintenance
as Associated with Training Needs:
Optometric Receptionist

N = 52

Rank	Task	Percentage Requiring Training
1	Maintain a clean and tidy waiting room	0
2	Keep your doctor's equipment clean	2
3	Keep your office equipment in good working order	2
4	Order printing supplies, office stationery, etc.	0
5	Order technical supplies	2
6	Order office supplies, e.g., soap, towels, magazines, coffee	0
7	Water the plants regularly	0
8	Know how to make coffee	0

TABLE 48

Relative Importance of Tasks for the Skill - Ordering Contact Lenses as Asssociated with Training Needs: Optometric Receptionist

N = 52

Rank	Task	Percentage Requiring Training
1	Know how to read a patient's contact lens chart	17
2	Be able to identify the type of contact lens from the patient's charts	15
3	Know the contact lens companies replacement policy and delivery dates	15
4	Know how to care for contact lenses	15
5	How to use contact lens solutions	13
6	Keep a record of all contact lens orders	12
7	Know how to order contact lens solutions	10
8	Keep a record of the dates for contact lens solutions	13
9	Keep a record of your contact lens stock	12

TABLE 49

Relative Importance of Tasks for the Skill - Ordering Ophthalmic Frames & Lenses as Associated with Training Needs: Optometric Receptionist

N = 52

Rank	Task	Percentage Requiring Training
1	Know how to read a prescription from a patient's file	8
2	Identify specifications for the frame parts	12
3	Know which distributors and/or labs from which to order frames and lenses	12
4	Perform minor repairs to frames	15
5	Use a frame catalogue	3
6	Know how to order parts of frames	3
7	Know how to keep a record of your frame stock	13
8	Know how to keep a record of all your frame and lens orders	10

further training.

Table 50, shows the ranked order, in relative importance, of 7 tasks for the skill "Use & Operate Business Machines" performed by and perceived in rank order by the Optometric Receptionist, and indicates no need for further training.

Table 51, Skills for an Optometric Assistant shows 18 skill areas ranked in relative importance as perceived in rank order by Optometric Assistants.

Table 52, shows the ranked order, in relative importance, of 11 tasks for the skill "Interpersonal Skills" performed by and perceived in rank order by the Optometric Assistant, and indicates no need for further training.

Table 53, shows the ranked order, in relative importance, of 10 tasks for the skill "Education" performed by and perceived in rank order by the Optometric Assistant, and indicates the need for further training. Of the 8 tasks that require further training, 1 task is located in the upper range, 4 tasks in the mid range and 3 tasks in the lower range.

Table 54, shows the ranked order, in relative importance, of 9 tasks for the skill "Lens Selection" performed by and perceived in rank order by the Optometric Assistant, and indicates the need for further training in 2 tasks, 1 task in the upper range and 1 task in the lower range.

TABLE 50

Relative Importance of Tasks for the Skill - Use & Operate Business Machines as Associated with Training Needs: Optometric Receptionist

N = 52

Rank	Task	Percentage Requiring Training
1	Use a calculator	0
2	Use a telephone answering machine	0
3	Utilize a dictaphone	6
4	Operate a postage meter	4
5	Operate a cheque writer	6
6	Operate a photo copier	6
7	Use and operate a computer	7

TABLE 51

Relative Importance of Skills: Optometric Assistant

N = 38

Rank	Skills
1	Interpersonal Skills
2	Education for Assistants
3	Lens Selection
4	Patient Education
5	Frame Selection
6	Frame Fitting (Dispensing)
7	Terminology
8	Ordering Rx from Labs
9	Repairing and Adjustments
10	Purchasing
11	Contact Lens Dispensing
12	Order Contact Lenses from Labs
13	Cost Analysis for the Finished Product
14	Handle Telephone
15	Preliminary Screening
16	Visual Training
17	Financial Statements
18	Math

TABLE 52

Relative Importance of Tasks for the Skill - Interpersonal Skills as Associated with Training Needs: Optometric Assistant

N = 38

Rank	Task	Percentage Requiring Training
1	Maintain effective working relationships with co-worker(s), patient(s) and doctors	0
2	Create a friendly and comfortable atmosphere	0
3	Develop sensitivity to the needs of patients	0
4	Act in a diplomatic manner	0
5	Be a good listener	3
6	Develop communication competencies	3
7	Be selective with what you say to a patient and know your legal limits	3
8	Explain the advantages and services provided by an optometric office	3
9	Describe the fee structure that is applied in your office	5
10	Be able to troubleshoot ophthalmic appliance problems	16
11	Develop good salesmanship techniques	11

TABLE 53

Relative Importance of Tasks for the
Skill - Education
as Associated with Training Needs:
Optometric Assistant

N = 38

Rank	Task	Percentage Requiring Training
1	Seminars/courses to update knowledge and technology in the field	26
2	Courses in communication skills	16
3	Keep up with new product knowledge	13
4	Office Management Training courses	26
5	Courses in time management	27
6	Assertive training	36
7	Courses in basic behavioral psychology	32
8	Stress management courses	36
9	Record management courses (filing systems)	24
10	Courses regarding first aid	37

TABLE 54

Relative Importance of Tasks for the
Skill - Lens Selection
as Associated with Training Needs:
Optometric Assistant

N = 38

Rank	Task	Percentage Requiring Training
1	Know how to read and understand the meaning of a prescription from patient's chart	8
2	Understand the function of parts of a lens, for example, sphere, cylinder, prism	24
3	Be able to analyze lenses using a lensmeter and a lens clock	15
4	Know the materials from which lenses are made	10
5	Know the types of single and multivision lenses	8
6	Know the availability of lenses	11
7	Know how the warranty applies to lenses, for example, Hardex lenses	8
8	Know lens finishes, for example, tints, and coatings, etc.	8
9	Know how lenses are manufactured and the time required for each stage of development	21

Table 55, shows the ranked order, in relative importance, of 9 tasks for the skill "Patient Education" performed by and perceived in rank order by the Optometric Assistant, and indicates the need for further training in 1 task in the lowest range.

Table 56, shows the ranked order, in relative importance, of 11 tasks for the skill "Frame Selection" performed by and perceived in rank order by the Optometric Assistant, and indicates no need for further training.

Table 57, shows the ranked order, in relative importance, of 6 tasks for the skill "Frame Fitting" performed by and perceived in rank order by the Optometric Assistant, and indicates no need for further training.

Table 58, shows the ranked order, in relative importance, of 5 tasks for the skill "Terminology" performed by and perceived in rank order by the Optometric Assistant, and indicates no need for further training.

Table 59, shows the ranked order, in relative importance, of 4 tasks for the skill "Ordering Rx from the Lab" performed by and perceived in rank order by the Optometric Assistant, and indicates no need for further training.

Table 60, shows the ranked order, in relative importance, of 6 tasks for the skill "Repairing & Adjustments" performed by and perceived in rank order by the Optometric Assistant, and indicates the need for further

TABLE 55

Relative Importance of Tasks for the Skill - Patient Education as Associated with Training Needs: Optometric Assistant

N = 38

Rank	Task	Percentage Requiring Training
1	Educate patients about the services available in the office	0
2	Advise patients about the types of lenses and frames available	0
3	Explain the importance of regular eye examinations	0
4	When dealing with a patient's question - understand the legality of your statements	16
5	Explain how third party billing functions, for example, A.H.C., Social Services etc.	0
6	Educate the patients on the merits of having a spare pair of eye glasses	0
7	Educate patients on how to care for ophthalmic appliances	11
8	When referrals to other Health Care offices and/or hospitals give patient information	0
9	Give patients instructions regarding low vision aids	24

TABLE 56

Relative Importance of Tasks from the Skill - Frame Selection as Associated with Training Needs: Optometric Assistant

N = 38

Rank	Task	Percentage Requiring Training
1	Conceptualize the prescription when selecting a frame for the patients	8
2	Determine the size of frame for the patient, for example, bridge, eye size, temple length	13
3	Understand the cosmetics of frame selection	8
4	Know the materials and construction of a frame	11
5	Know the manufacturers of the frames	3
6	Know the availability of the frames	0
7	Know how to take patient's pupillary distance and be able to calculate their near P.D.	13
8	Know the frame amd lens fee structure for the office	8
9	Be able to read the frame manufacturer's catalogue in order to select the proper size, color etc. of frame	0
10	Be able to measure a patient's bifocal height	16
11	Know the courier services available from the labs	11

TABLE 57

Relative Importance of Tasks for the Skill - Frame Fitting as Associated with Training Needs: Optometric Assistant

N =38

Rank	Task	Percentage Requiring Training
1	Verify that the prescriptions ordered from the lab have been fabricated correctly	16
2	Dispense the frame to the patient	13
3	Advise the patient on adaptation to new lenses	18
4	Instruct the patient on the use and care of new prescription	5
5	Offer reassurance and positive re-inforcement to the patient	0
6	Give patients advice regarding follow-up care when necessary	0

TABLE 58

Relative Importance of Tasks for the
Skill - Terminology
as Associated with Training Needs:
Optometric Assistant

N = 38

Rank	Task	Pecentage Requiring Training
1	Anatomy: Describe how the eye is structured and be able to identify the major parts of an eye	13
2	Definitions: Define and understand common terms that relate to the eye and vision	13
3	Physiology: Describe how the eye and parts basically function	13
4	Understand enough terminology relating to the eye to distinguish a sign from a symptom	13
5	Recognize the basic function of ophthalmic equipment	16

TABLE 59

Relative Importance of Tasks for the Skill - Ordering Rx from the Lab as Associated with Training Needs: Optometric Assistant

N = 38

Rank	Task	Percentage Requiring Training
1	Know how to read the prescription, lens and frame selection on a patient's chart	0
2	Know how to order using lab forms	0
3	Know which lab/manufacturer from which to get the desired products	4
4	Know how long it takes to get an order from the labs/ manufacturers	5

TABLE 60

Relative Importance of Tasks for the Skill - Repairing & Adjustments as Associated with Training Needs: Optometric Assistant

N = 38

Rank	Task	Percentage Requiring Training
1	Have knowledge of frame names and frame parts	5
2	Know when to advise patients that they are due for an eye examination rather than repair an existing out-dated prescription in an old frame	0
3	Know when not to adjust a frame	16
4	Be able to improvise with temporary repairs	11
5	Know the product availability	11
6	Know how to customize frames when possible	24

training in 1 task in the lower range.

Table 61, shows the ranked order, in relative importance, of 6 tasks for the skill "Purchasing" performed by and perceived in rank order by the Optometric Assistant, and indicates the need for further training in 3 tasks. Of the 3 tasks that require training, 1 task is located in the mid range and 2 tasks are located in the lower range.

Table 62, shows the ranked order, in relative importance, of 9 tasks for the skill "Contact Lens Dispensing" performed by and perceived in rank order by the Optometric Assistant, and indicates the need for further training in 4 tasks. Of the 4 tasks that require training 2 tasks are located in the upper range, 1 task in the mid range and 1 task in the lower range.

Table 63, shows the ranked order, in relative importance, of 4 tasks for the skill "Ordering Contact Lenses from the Lab" performed by and perceived in rank order by the Optometric Assistant, and indicates no need for further training.

Table 64, shows the ranked order, in relative importance, of 5 tasks for the skill "Cost Analysis for the Finished Product" performed by and perceived in rank order by the Optometric Assistant, and indicates no need for further training.

Table 65, shows the ranked order, in relative importance, of 5 tasks for the skill "Handling the Telephone"

TABLE 61

Relative Importance of Tasks for the Skill - Purchasing as Associated with Training Needs: Optometric Assistant

N = 38

Rank	Task	Percentage Requiring Training
1	Be familiar with return policy and guarantees on frames	11
2	Be familiar with various discount systems, for example, bulk purchasing and -- discounts on lab bills	16
3	Know the warranty on lenses	11
4	Know the laboratory warranty on contact lenses	24
5	Know the laboratory return policy on contact lenses	21
6	Know the supplier's return policy on contact lens solutions	21

TABLE 62

Relative Importance of Tasks for the Skill - Contact Lens Dispensing as Associated with Training Needs: Optometric Assistant

N = 38

Rank	Task	Percentage Requiring Training
1	Verify that the contact lens prescription from the lab is correct	31
2	Be able to perform correctly the insertion and removal techniques for contact lenses	21
3	Deal with patients' concerns regarding the misinformation they may have about contact lenses	16
4	Know contact lens maintenance	18
5	Know which solutions to use for the care of contact lenses	21
6	Make certain that the patients understand the wearing schedule	13
7	Make certain that the patients understand the importance of follow-up care and rechecks	11
8	When it applies, advise patients about contact lens warranties	0
9	Be able to make minor adjustments to hard contact lenses	35

TABLE 63

Relative Importance of Tasks for the Skill - Ordering Contact Lenses from the Lab as Associated with Training Needs: Optometric Assistant

N = 38

Rank	Task	Percentage Requiring Training
1	Know and understand the prescription from a patient's contact lens chart	13
2	Know from which lab to order a specific type of contact lens	16
3	Know the office's fee structure regarding new contact lens patients	11
4	Know the office's fee structure regarding patients' contact lens replacement	13

TABLE 64

Relative Importance of Tasks for the Skill - Cost Analysis for the Finished Product as associated with training needs: Optometric Assistant

N = 38

Rank	Task	Percentage Requiring Training
1	Cost for lenses	11
2	Know your office's dispensing fees	3
3	Cost for frames	5
4	Be aware of the current market fees within the industry	8
5	Understand your office's referral fees	5

TABLE 65

Relative Importance of Tasks for the Skill - Handling the Telephone as Associated with Training Needs: Optometric Assistant

N = 38

Rank	Task	Percentage Requiring Training
1	Keep conversation general when dealing with telephone shoppers	8
2	Know how to limit the questions and answers when dealing with a telephone shopper	8
3	Be non-commital regarding fees when dealing with a telephone shopper	6
4	Secure the telephone shopper's name and phone number (sometimes address in order to mail them information)	11
5	Direct the telephone shopper into the office in order to further answer their specific questions	3

performed by and perceived in rank order by the Optometric Assistant, and indicates no need for further training.

Table 66, shows the ranked order, in relative importance, of 8 tasks for the skill "Preliminary Screening" performed by and perceived in rank order by the Optometric Assistant, and indicates the need for further training in 7 tasks. Of the 7 tasks that require training, 3 tasks are in the upper range, 2 tasks are in the mid range and 2 tasks are in the lower range.

Table 67, shows the ranked order, in relative importance, of 7 tasks for the skill "Visual Training" performed by and perceived in rank order by the Optometric Assistant, and indicates the need for further training in all tasks.

Table 68, shows the ranked order, in relative importance, of 3 tasks for the skill "Financial Statements" performed by and perceived in rank order by the Optometric Assistant, and indicates the need for further training in all tasks.

Table 69, shows the ranked order, in relative importance, of 4 tasks for the skill "Math" performed by and perceived in rank order by the Optometric Assistant, and indicates no need for further training.

A Summary of Section Three

A summary of Tables 36 to 50 for Optometric

TABLE 66

Relative Importance of Tasks for the Skill - Preliminary Screening as Associated with Training Needs: Optometric Assistant

N = 38

Rank	Task	Percentage Requiring Training
1	Understand why you pre-test	34
2	Filling out patient's cards, re: history	29
3	Check uncorrected or unaided visual acuity	34
4	Be able to use a tonometer	18
5	Check patient for color vision defects	34
6	Perform field testing	42
7	Check for binocular vision	45
8	Take blood pressure readings	37

TABLE 67

Relative Importance of Tasks for the Skill - Visual Training as Associated with Training Needs: Optometric Assistant

N = 38

Rank	Task	Percentage Requiring Training
1	Understanding basic terminology	34
2	Administer health history questionnaire	36
3	Understand basic visual training equipment	42
4	Understand visual training techniques	42
5	Know how to use visual training equipment	34
6	Motivate the patient to maintain visual training therapy	39
7	Maintain patient's visual training progress charts for the doctor	34

TABLE 68

Relative Importance of Tasks for the Skill - Financial Statements as Associated with Training Needs: Optometric Assistant

N = 38

Rank	Tasks	Percentage Requiring Training
1	Analyze financial statements in order to make office projection decisions	24
2	Be able to do cost accounting, for example, cost-volume-profit analysis	23
3	Understand tax considerations in business decision	24

TABLE 69

Relative Importance of Tasks for the
Skill - Math
as Associated with Training Needs:
Optometric Assistant

N = 38

Rank	Task	Percentage Requiring Training
1	Perform basic mathematical Operations	0
2	Compute with dollars and cents	0
3	Understand basic principles of algebra	8
4	Calculate weights and measures	5

TABLE 70

Ranked Skills for Optometric Receptionists and Assistants as Associated with Training Needs

Rank	Skills for Receptionists	Training Needs
1	A - Interpersonal Skills	0
2	B - Dependability	0
3	C - Telephone Techniques	0
4	D - Appointment Management	0
5	E - Terminology	1
6	F - Record Management	0
7	G - Accounting	0
8	H - General Office Procedures	0
9	I - Typing	0
10	J - Writing Competencies	0
11	K - Inner Office Maintenance	0
12	L - Ordering Contact Lenses	0
13	M - Order Ophthalmic Frames & Lenses	0
14	N - Use & Operate Business Machines	0
	Skills for Assistants	
1	A - Interpersonal Skills	0
2	B - Education for Assistants	8
3	C - Lens Selection	2
4	D - Patient Education	1
5	E - Frame Selection	0
6	F - Frame Fitting (Dispensing)	0
7	G - Terminology	0
8	H - Order Rx from Labs	0
9	I - Repairing & Adjustments	1
10	J - Purchasing	3
11	K - Contact Lens Dispensing	4
12	L - Order Contact Lenses from Labs	0
13	M - Cost Analysis for Materials	0
14	N - Handle Telephone	0
15	O - Preliminary Screening	7
16	P - Visual Training	7
17	Q - Financial Statements	3
18	R - Math	0

Receptionists shows the need for training in the skill "Terminology" for one task only and it was located in the lower range.

A summary of the Tables 51 to 69 for the Optometric Assistants shows the need for training in 36 tasks involving 9 skills. Of the 36 tasks for which training is required, 11 were from the upper range, 11 from the mid range and 14 from the lower range.

Table 70 summarizes the ranked skills in relative importance for the Optometric Receptionists and the Optometric Assistants as associated with training needs. Only one task showed the need for training by the Optometric Receptionists. This task was from Skill E, Terminology, Task E-9 "Maintain a dictionary of optometric terms". In contrast, the Optometric Assistants indicated the need for training in nine Skills categories comprising a variety of 36 tasks. The 36 tasks were identified as not being performed because further training was required.

Chapter 5

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS FOR FURTHER STUDY

The final chapter of this thesis contains the summary, conclusion and recommendations based on the results. The first section is a summary of the research study. The second section discusses the conclusions derived from the study and the third and final section deals with recommendations for further research.

Summary

The major purpose of this research study was to establish job classifications for optometric ancillary personnel by creating a Profile of Occupational Skills and Tasks (POST) for the Optometric Receptionist, and by creating a Profile of Occupational Skills and Tasks (POST) for the Optometric Assistant. The study also sought answers to the following research questions: 1. What skills and tasks are performed in the job of an Optometric Receptionist? 2. To what extent did the Optometric Receptionists acquire their skills and tasks prior to entering the job, on the job or through courses, seminars or workshops? 3. What skills and tasks relevant to the role of an Optometric Receptionist are not performed because further training and education are required? 4. What is the ranked order, in relative importance, of the skills and tasks performed by Optometric Receptionists as perceived by them? 5. Which of the tasks ranked high, medium or low in order of relative importance, as perceived by them, are associated with training needs for the Optometric Receptionists? 6. What skills and tasks are performed in the job of an Optometric Assistant? 7. To what extent did the Optometric Assistants acquire their skills and tasks prior to entering the job, on the job or through courses, seminars, or workshops? 8. What skills and tasks relevant to the role of an Optometric Assistant are not performed because further training and education are required? 9. What is the ranked order, in relative importance, of the skills and tasks performed by Optometric Assistants as perceived by them? 10. Which of the tasks ranked high, medium or low in order of relative importance, as perceived by them, are associated with training needs for Optometric Assistants?

In order to collect the data to develop occupational profiles for optometric ancillary personnel an instrument was created called the Profile of Occupational Skills and Tasks (POST). One POST chart was created by the developmental workshop committee for the Optometric Receptionists and contained 14 skills consisting of a variety of tasks totalling 108. One POST chart was created by the developmental workshop committee for the Optometric Assistants and contained 18 skills, consisting of a variety of tasks totalling 122. The validation process resulted in 52 responses from the Optometric Receptionists and 38 responses from the Optometric Assistants which were tabulated and analyzed to determine the major findings. The research was conducted in two phases.

Phase One

The first phase of the study was the development of two data collecting instruments: one for the Optometric Receptionist and one for the Optometric Assistant. This was accomplished by holding two separate developmental workshops.

The first workshop was to develop the data collecting instrument for Optometric Receptionists, and consisted of eight optometric ancillary personnel. Four of the optometric ancillary personnel performed the duties of a receptionist as well as the duties of an assistant, while four performed duties of a receptionist.

The second workshop was to develop the data collecting instrument for Optometric Assistants and consisted of five optometric ancillary personnel. Two persons performed the duties of an assistant as well as the duties of a receptionist, while three performed duties of an assistant.

Phase Two

The second phase of the study was the validation process. In accordance with studies of this type the "Competency Analysis Profile (CAP) System", and the "Profile of Occupational Skills and Tasks (POST) System", the occupational profile charts which were developed during phase one were validated by submitting the basic document to a larger number of practitioners in the occupation under review. In this study the validation of the occupational profile charts was accomplished through a Province-wide mailing to 141 optometric offices. Each office received two POST charts, one POST chart for their receptionist and one POST chart for their assistant. During the validation process the respondents were asked to rank in relative importance, as perceived by them, the skills and tasks on their POST chart. Following the ranking procedures the respondents were then asked the following questions: Question A: Do you perform this task? If the respondents performed the task they were asked question B I: Where did you learn this task? (a) Prior to entering the field you are working in? or, (b) I learned to perform this task on the job, or, (c) I learned to perform this task by attending seminars, taking courses, or through workshops. If the respondents did not perform the task they were asked Question B II: Which of the following statements describes why you do not perform this task? (a) The task is not relevant in order for me to perform my job, or (b) The task is relevant to my job, but I require additional training.

Conclusions

The conclusions are based upon the findings derived from an analysis of data and are presented in the following sections, which are grouped according to the the research questions in Chapter One, "Statement of the Problem".

In reporting the data, responses totalling 50 percent and above are referred to as the "majority", with the exception for the data referring to the "need for training", responses totalling 20 percent and above were deemed to be tasks for which respondents required further training. The terms upper range, mid range and lower range were used to describe relative position of ranking of the skills and tasks.

Research Question 1

"What skills and tasks are performed in the job of an Optometric Receptionist?"

The skills and tasks that were identified as being performed on the job by Optometric Receptionists consisted of 108 tasks which were grouped into 14 skill categories.

Research Question 2

"To what extent did the Optometric Receptionists acquire their skills and tasks prior to entering the job, on the job or through courses, seminars, or workshops?"

Upon analyzing the 108 tasks that were identified on the data collecting POST chart for the Optometric Receptionists it was shown that of the 14 skill categories containing 108 tasks, 30 (or 27%) of the tasks were learned by the majority of respondents "prior to entering the job", while 57 (or 53%) of the tasks were learned by the majority of the respondents "on the job". Of the 108 skills, "Terminology" was learned by 24 percent of the respondents at seminars and 16 percent of the respondents learned "Interpersonal Skills" at seminars.

Research Question 3

"What skills and tasks relevant to the role of an Optometric Receptionist are not performed because further training and education are required?"

Only one task "Maintain a dictionary of optometric terms" from the Skill "Terminology" was identified by 21 percent of the Optometric Receptionists as an area for further training. In contrast the Optometric Assistants indicated on their profile chart the need for further training and education requirements for 36 (or 30%) of the tasks involving 18 skill categories.

Research Question 4

"What is the ranked order, in relative importance, of the skills and tasks performed by Optometric Receptionists as perceived by them?"

The skills from the upper range, along with the first three tasks for these skills are as follows: Skill A - Interpersonal Skills, Task A-1, Receive patients and office visitors; Task A-2, Maintain effective working relationships, be part of a team; and Task A-3, Create a friendly and comfortable atmosphere. Skill B - Dependability, Task B-1, Project a professional appearance; Task B-2, Adhere to work time schedule; and task B-3, Keep patients' confidentiality. Skill C - Telephone Techniques, Task C-1, Use acceptable telephone manners; Task C-2, Determine if you can assist this caller; and Task C-3, Be perceptive when screening telephone calls, e.g., know if it is an emergency. Skill D - Appointment Management, Task D-1, Determine the patients' needs when they are making appointments; Task D-2, Know the time required for the patient's appointment; and Task D-3, Always obtain the patient's name and telephone number. Skill E - Record Management, Task E-1, Define the optometric services that your office provides; Task E-2, Explain the fee structure for your office; and Task E-3, Distinguish differences regarding and Optometrist, Ophthalmologist and an Optician.

For the complete overview of the remaining nine skills and ninety-three tasks for an Optometric Receptionist please refer to Chart 3, "Profile of Occupational Skills and Tasks for an Optometric Receptionist" which is located in the pocket attached to the inside back cover of the thesis.

__Research Question 5__

"Which of the tasks ranked high, medium or low in order of relative importance, as perceived by them are associated with training needs for the Optometric

Receptionists?"

Only one task showed the need for training by 21 percent of the respondents. Task E-9, "Maintain a dictionary of optometric terms" from Skill E, "Terminology" was located in the upper range of the profile chart. Although this task was located in a skill from the upper range, it is considered not important as an area associated with training needs as the task was only ranked ninth out of ten tasks.

Research Question 6

"What skills and tasks are performed in the job of an Optometric Assistant?"

The skills and tasks that were identified as being performed on the job by Optometric Assistants consisted of 122 tasks which were grouped into 18 skill categories.

Research Question 7

"To what extent did the Optometric Assistants acquire their skills and tasks prior to entering the job, on the job or through courses, seminars, or workshops?"

Upon analyzing the 122 tasks that were identified on the data collecting POST chart for the Optometric Assistants, it was shown that of the 18 skills containing 122 tasks, 9 (or 7%) of the tasks were learned by the majority of respondents "prior to entering the job", while 82 (or 67%) of the tasks were learned by the majority of respondents "on the job".

Research Question 8

"What skills and tasks relevant to the role of an Optometric Assistant are not performed because further training and education are required?"

Of the 18 skill categories, the following nine skills containing a variety of 36 tasks (or 30%) were identified as not being performed by the Optometric Assistants because further training and education are required. Eight tasks in Skill "Education for Assistants", seven tasks in Skill "Visual Training", seven tasks in Skill "Preliminary Screening", four tasks in Skill "Contact Lens Dispensing", three tasks in Skill "Purchasing", three tasks in the Skill "Financial Statements", two tasks in Skill "Lens Selection", one task in Skill "Patient Education" and one task in the Skill "Repairing and Adjustments".

Research Question 9

"What is the ranked order, in relative importance, of the skills and tasks performed by Optometric Assistants as perceived by them?"

The skills from the upper range, along with the first three tasks for these skills are as follows: Skill A - Interpersonal Skills, Task A-1, Maintain effective working relationships with co-worker(s), patient(s) and doctor(s); Task A-2, Create a friendly and comfortable atmosphere; and Task A-3, Develop sensitivity to the needs of patients. Skill B - Education for Assistants, Task B-1, Seminars/courses to update knowledge and technology in the field; Task B-2, Courses in communication skills; and Task B-3, Keep up with new product knowledge. Skill C - Lens Selection, Task C-1, Know how to read and understand the meaning of a prescription from patient's chart; Task C-2, Understand the function of parts of a lens, for example, sphere, cylinder, prism; and Task C-3, Be able to analyse lenses using a lensmeter and a lens clock. Skill D - Patient Education, Task D-1, Educate patients about the services available in the office; Task D-2, Advise patients about the types of lens and frames available; and Task D-3, Explain the importance of regular eye examinations. Skill E - Frame Selection, Task E-1, Conceptualize the prescription when selecting a frame for the patients; Task E-2, Determine the size of frame for the patient, for example, bridge, eye size, temple length, and Task E-3, Understand the cosmetics of frame selection. Skill F - Frame Selection, Task F-1, Verify that the prescriptions ordered from the lab have been fabricated correctly; Task F-2, Dispense the frame to the patient; and Task F-3, Advise the patient on adaptation to new lenses.

For the complete overview of the remaining 12 skills and 104 tasks for an Optometric Assistant please refer to Chart 4, "Profile of Occupational Skills and Tasks for an Optometric Assistant" which is located in the pocket attached to the inside back cover of the thesis.

Research Question 10

"Which of the tasks ranked high, medium or low in order of relative importance, as perceived by them are associated with training needs for the Optometric Assistants?"

Thirty-six (or 30%) of the tasks that were identified as areas where training is needed involved 9 skills categories. Of the nine skills identified as areas where training is needed, three skills and 11 tasks were from the upper range: Skill B, "Education for Assistants"; Skill C, "Lens Selection" and Skill D, "Patient Education". Three skills and 11 tasks were from the mid range: Skill I, "Repairing and Adjustments"; Skill J, "Purchasing"; and Skill K, "Contact Lens Dispensing", and three skills and 14 tasks were from the lower range: Skill O, "Preliminary Screening"; Skill P - "Visual Training"; and Skill - Q, "Financial Statements".

Recommendations

The recommendations that were drawn from the findings and conclusions of this research study are presented in this section.

1. It is recommended that the Alberta Association of Optometrists use the two Profiles of Occupational Skills and Tasks as the central focus point for having an educational institution prepare a training program for optometric

ancillary personnel.

2. It is recommended that the POST charts be utilized by the Alberta Association of Optometrists as a guide for identifying those competencies needed prior to hiring their ancillary personnel.

3. It is recommended that the Alberta Association of Optometrists use the POST charts as a basis for providing and developing on the job training for their ancillary personnel.

4. It is recommended that Optometric Receptionists and Optometric Assistants use the skills and tasks identified in the POST charts as a basis for their individual professional and career development.

5. It is recommended that the identified skills and tasks forming job classifications for an Optometric Receptionist and an Optometric Assistant serve as a basis for inclusion into Career Profiles, in the Province of Alberta, and the Canadian Occupational Dictionary.

6. It is recommeded that the data generated in this study be examined for relevance to other Provinces in Canada and to many States in the United States of America.

Methodological Considerations

The methodology utilized in this study could be utilized by any researcher on behalf of an occupational group who wishes to create an occupational profile for their job classification.

However, it is recommended that when this methodology is used by other researchers that the profile charts be redesigned. For example, instead of displaying the skills and tasks on a large cumbersome profile chart to collect the data, letter size paper should be used. The skills and tasks would be listed on the left-hand side of the paper with columns providing space to the right of the paper for responses to the questions that were posed in this study. The utilization of letter size paper would facilitate the ease of completing the questionnaire for the participants as well as analysing the data for the researcher.

It is also recommended that during the developmental workshop procedures that a Q-sort technique be utilized to facilitate the individual ranking of the skills and tasks.

Further, it is recommended that during the validation stage a Likert type rating scale be utilized as this would assist in identifying more accurately the relative importance of the skills and tasks as perceived by the participants. This procedure may enable the researcher to compute a numerical coefficient of ranking preference.

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APPENDIX A

Correspondence with the Alberta Optometric Association

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September 24, 1984

Dr. C. McQueen
President of the
Alberta Optometric Association
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Edmonton, Alberta

Dear Dr. McQueen:

I am presently engaged in the Faculty of Graduate Studies at the University of Alberta, in the Industrial and Vocational Department of Education completing my thesis for a Masters of Education Degree.

The purpose of this research is to identify, validate, analyze and rank the skills and tasks performed by an optometric receptionist and an optometric assistant in order to establsih a profile of occupational skills and tasks performed by them. I feel the need for such an occupational task analysis is relfected by the lack of an occupational profile by Careers Canada, Careers Alberta and Occupational Profiles, Alberta. Resulting from the lack of an established occupational profile my research addresses the following questions:

1. What skills and tasks used on the job by them will be perceived to be relevant for the job?

2. When did the optometric receptionist and the optometric assistant acquire the knowledge to perform the skills and tasks that are required for the job: a) prior to the job? or b) on-the-job?

3. To what extent will there be agreement among the participating optometric receptionists and optometric assistants regarding the skills and tasks required for the job?

I further feel that the lack of an occupational profile for an optometric receptionist and an optometric assistant may hamper an optometrist's decision making process regarding: (1) which skills and tasks to delegate, and to whom should they be delegated? (2) making an effective hiring decision when selecting new personnel, (3) the understanding of which skills and tasks that have to be taught on the job or through seminars and/or courses, and (4) which skills and tasks should be acquired by auxiliary personnel before entering the job.

Also, the further lack of occupational profiles affects the potential optometric receptionist and assistant because he/she cannot have a full understanding of what is expected from their employer in order to function effectively on the job.

The findings from my research will be presented by using two occupational profile charts: one for the optometric receptionist and one for the optometric assistant. The charts will display the generic skills and related tasks ranked in order of importance enabling these persons to function on the job. Copies of these charts and related research will be made available to the Alberta Optometric Association.

I am writing to request a letter from you as the President of the Alberta Optometric Association to say that you feel my research will become a valuable background document for the optometric profession. I would further ask that your letter state that you do encourage the membership to motivate their staff to support my efforts to validate my research. This will involve optometric staff participation by way of a mailed questionnaire.

I am enclosing a copy of the thesis proposal which has just been accepted by the Department of Industrial and Vocational Education. Since time is of the essence, and I am working to a deadline, may I hear from you soon. If you have any questions please do not hesitate to contact me.

Yours truly,

Marlowe Lindberg

Marlowe Lindberg, B. Ed.

ALBERTA OPTOMETRIC ASSOCIATION

THE PROFESSIONAL CENTRE, NO. 2, 8333 - 80TH STREET, EDMONTON, ALBERTA T6B 2L5
TELEPHONE: (403) 468-1203

October 9th, 1984

Mrs. Marlowe Lindberg
7416 - 182nd Street
Edmonton, Alberta
T5T 2G7

Dear Mrs. Lindberg:

Thank you for your letter of September 24th and for the copy of your research proposal.

The results of such research may indeed prove to be useful in the development of more structured education and training for optometric assistants and optometric receptionists. Such a result would undoubtedly prove beneficial to the Optometrists and to our our patients - the people of Alberta.

Considering the very busy schedule of most optometric receptionists and assistants, I feel that your work with them must be subject to the following reasonable conditions:

1 - Requests for the participation of the receptionist or assistant must be made through the optometrist-employer. The optometrist may then request the co-operation of the receptionist or assistant.

2 - Where the optometrist-employer has granted approval, the co-operation of the receptionist or assistant shall nonetheless be voluntary.

3 - The time required of the participants shall be outside their hours of required employment.

4 - The participation of the receptionist or assistant shall not generate any cost to the optometrist-employer or to the participant.

I shall be recommending to the Council of the Alberta Optometric Association that they support your proposal and that, subject to the aforementioned conditions, that Council urge the co-operation of the membership. If the Council approves my recommendation, a copy of this letter will be sent to the A.O.A. membership.

I wish you all the best in your work and look forward to the results of this research.

Yours truly,

For:
J. Craig McQueen, O.D.
President

[illegible]

ALBERTA OPTOMETRIC ASSOCIATION
2, 9333 - 50 STREET
EDMONTON, ALBERTA T6B 2L5
TELEPHONE: (403) 468-1203

Circulated to:

	For Action	For Information
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Legal Counsel	☐	☐
CAO Representative	☐	☐
CAO Ex. Director	☐	☐
Council Members	☐	☐
Committee:	☐	☐

TO: All A.O.A. Members

FROM: Adrian D. Berry
Executive Director

November 7th, 1984

Action Requested by: ____________________

Re: RESEARCH PROJECT RE OPTOMETRIC RECEPTIONISTS AND ASSISTANTS OCCUPATIONAL SKILLS PROFILE.

Prior to the last Council Meeting your President received a request from (Mrs.) Marlowe Lindberg for endorsation of her proposed student research project. The project proposes to identify, validate, analyze, etc. the skills and tasks required of optometric receptionists and assistants in order to establish a profile of occupational skills required and tasks performed.

Dr. McQueen reported on this proposal to the October 21st Council Meeting recommending that it be supported in accordance with the conditions set out in his letter of October 9th to Mrs. Lindberg - copy attached.

Subsequently the following motion was carried:

> "Subject to the conditions stated in Dr. McQueen's letter of reply to Mrs. Lindberg regarding her proposed research project, Council supports the project as outlined."

For your information.

Thank you.

ADB:blw
Encl.

APPENDIX B

Correspondence with the Canadian Optometric Association

FACULTY OF EDUCATION
DEPARTMENT OF INDUSTRIAL AND
VOCATIONAL EDUCATION
TELEPHONE (403) 432-[illegible]

THE UNIVERSITY OF ALBERTA
EDMONTON, ALBERTA, CANADA
T6G 0Y1

Canadian Association of Optometrists
Ste. 207
77 Metcalfe Street
Ottawa, ON
K1P 5L6

Dear Sirs:

I am presently engaged in research in the Faculty of Graduate Studies at the University of Alberta, in the Industrial and Vocational Department of Education completing my thesis for a Master's of Education Degree.

In my research I am applying a new methodology for conducting an occupational task analysis. This will produce an occupational profile chart identifying generic skills and related tasks that are required in order to function successfully within a specific occupation.

Because of the many years of familiarity with the profession of optometry, I have chosen optometric auxiliary staff to pilot my methodology. The findings from my research will be presented on two occupational profile charts: one for the optometric receptionist and one for the optometric assistant.

You can assist by advising me if you are aware of any institutions, in Canada specificially, that currently provide a program of training for optometric auxiliary personnel.

Your early reply will be greatly appreciated.

Yours truly,

Marlowe Lindberg

Marlowe Lindberg, B. Ed.

CANADIAN ASSOCIATION OF OPTOMETRISTS
ASSOCIATION CANADIENNE DES OPTOMÉTRISTES

January 30, 1985

Ms. Marlowe Lindberg, B. Ed.
Faculty of Education
Dept. of Industrial and
Vocational Education
University of Alberta
Edmonton, Alberta
T6G 0Y1

Dear Ms. Lindberg:

As requested, we have researched institutions in Canada that currently provide a program of training for optometric auxiliary personnel.

We have contacted the Conestoga College in Kitchener, Ontario who in the past provided such a program. We were told that the program is no longer being provided. We know of no other institutions in Canada that provide the requested program.

A complete detailed description of the Conestoga course program is enclosed for your information. It is hoped that this information may be useful for your thesis. We would greatly appreciate receving a copy of your thesis once it is completed.

Wishing you every success in your endeavours.

Yours truly,

Gerard A. Lambert
Executive Director

GAL:am

Encl.

c.c. Dr. Scott Brisbin, CAO Councillor (Alberta)

77, rue Metcalfe Street, Suite 207, Ottawa, Ontario, K1P 5L6 Canada Tel: (613) 238-2006

APPENDIX C

Correspondence with Optometric Receptionists and Optometric Assistants Requesting Participation for the Workshops to Produce the Original Profile of Occupational Skills and Tasks

DEPARTMENT OF INDUSTRIAL
AND VOCATIONAL EDUCATION
FACULTY OF EDUCATION
THE UNIVERSITY OF ALBERTA

October 8th, 1984

DEAR EDMONTON AND AREA OPTOMETRIC AUXILIARY STAFF:

Your experience would be a definite asset in the method I will be using to create a Profile of Occupational Tasks and Skills for Optometric Receptionists and Optometric Assistants. I hope that you will be able to participate in either of the two day seminars that I am holding in Edmonton. I will require a minimum of twelve persons per seminar.

The first seminar will be October 27th and 28th for the Optometric Receptionists, from 9:00 am to 4:00 pm. The second seminar will be November 3rd and 4th for the Optometric Assistants, from 9:00 am to 4:00 pm. Both seminars are being held over a weekend so as to not interfere with your regular working day. Refreshments and lunch will be provided at no charge to you, along with a $25.00 honorarium per person per two day seminar.

Your contribution is imperative for the completion of this research and your response would be greatly appreciated. Please find enclosed participation forms which will give you a clearer overview of what to expect.

Yours truly,

Marlowe Lindberg

Marlowe Lindberg
Graduate Student
Department of
Industrial and
Vocational Education

K. Puffer.

Dr. K. Puffer,
Chairman for my Thesis Committee
University of Alberta
Edmonton, Alberta

Enclosure

845 EDUCATION SOUTH, EDMONTON, ALBERTA, CANADA • T6G 2G5 • TELEPHONE (403) 432-3678

no.___

The Seminars will be held at the Alberta Vocational Centre, 10215 - 108 Street, from 9:00 am to 4:00 pm, in Room 708 .

Seminar One for the Receptionists: October 27th and 28th, 1984, and
Seminar Two for the Assistants: November 3rd and 4th, 1984.

WHICH SEMINAR SHOULD YOU ATTEND? In order to help you determine which category you fit into I have given a very brief over-view of the skills and tasks that receptionists perform along with skills and tasks that an optometric assistant performs. It is my hope, that after reading these descriptions you will be able to place yourself into the appropriate seminar, however, if you have any questions please do not hesitate to contact me either at home 481-3947 or at my office at 422-5835.

An Optometric Receptionist: is a person who has been hired to attend to clerical tasks, such as: maintain a filing system, make appointments and receive patients, type letters and maintain an accounting system.

An Optometric Assistant: is a person who has been hired to assist the optometrist by performing technical skills, under the optometrists care and supervision, that benefits the patient and saves the optometrist professional time.

I will make arrangements for you to park in the parking lot North of the building. Entrance into the building must be done from the West entrance on 108th Street. If someone is not there to meet you and you are a little late there is a buzzer located to the upper left of the entrance. This will summons the Commissionaire who will open the door for you.

If you are able to attend, please complete this bottom portion of the form and return it in the stamped addressed envelope before October 17, 1984.

----

no.___

I, ________________________________ from

Doctor______________________________ office will attend

the following seminar:

PLEASE CHECK WHICH SEMINAR YOU WILL BE ATTENDING.

RECEPTIONIST (___) OCTOBER 27TH AND 28TH, 1984

ASSISTANT (___) NOVEMBER 3RD AND 4TH, 1984

APPENDIX D

List of Participants Who Took Part in the Workshops and Produced the Original Profile of Occupational Skills and Tasks

DEVELOPMENTAL WORKSHOP PARTICIPANTS

Optometric Receptionists

- Leona Bazinet
- Judie Belland
- Pamela Dean
- Carol Magilton
- Eleanor McEwen
- Mary Paisley
- Connie Soliski
- Daniella Little

Optometric Assistants

- Leona Bazinet
- Judie Belland
- Jackie Allison Grice
- Connie Soliski
- Kelly Zingle

APPENDIX E

Correspondence along with Instructions to Optometrists Requesting Their Assistance to have Their Staff Validate the Profile of Occupational Skills and Tasks

FACULTY OF EDUCATION
DEPARTMENT OF INDUSTRIAL AND
VOCATIONAL EDUCATION
TELEPHONE (403) 432-3678

THE UNIVERSITY OF ALBERTA
EDMONTON, ALBERTA, CANADA
T6G 0Y1

December 6, 1984

DEAR OPTOMETRIC PRACTITIONER:

I am presently engaged in research in the Faculty of Graduate Studies at the University of Alberta, in the Industrial and Vocational Department of Education completing my thesis for a Master's of Education Degree.

In my research I am applying a new methodology for conducting an occupational task analysis. This will produce an occupational profile chart identifying generic skills and related tasks that are required in order to function successfully within a specific occupation.

Because of the many years of familiarity with your profession, I have chosen optometric auxiliary staff to pilot my methodology. The findings from my research will be presented in two occupational profile charts: one for the Optometric Receptionist and one for the Optometric Assistant.

I am therefore requesting your cooperation by asking you to allow your staff to participate in the validation of these two charts that were prepared by a group of their colleagues.

Responding to these profile charts should take no more than 30 to 45 minutes. Please give this along with the enclosed instructions, the two profile charts and self-addressed stamped envelope to your staff for their completion and have them return the completed profile charts to me before January 18, 1985.

Thank you for your cooperation.

Yours truly,

Marlowe Lindberg

Marlowe Lindberg, B. Ed.
Graduate Student, Department of
Industrial and Vocational Education,
University of Alberta

Enclosures

Note: If you do not wish to complete the enclosed Profile Charts please return them to me in the stamped self-addressed envelope. If you do wish to complete them please continue and read the following.

DIRECTION FOR COMPLETING THE PROFILE CHARTS

If you are the only optometric auxiliary staff person in the office then please fill out as much as you can on BOTH Charts and identify for me WHICH occupation category you feel you best fit into, for example: either a Optometric Receptionist or an Optometric Assistant

or

If there is more than one optometric auxiliary staff person in the office then please identify the person that best fits the occupational category for an Optometric Receptionist and have that person complete the Profile Chart for the Receptionist, also identify one person that best fits the occupational category for an Optometric Assistant and have that person complete the Profile Chart for the Assistant.

DIRECTIONS FOR COMPLETING THE PROFILE CHARTS

STEP ONE

As you read over the Profile Chart you will notice the boxes at the left are identified as Bands, for example Band A, Band B etc. Each Band represents a generic skill which is located vertically on the Profile Chart.

STEP TWO

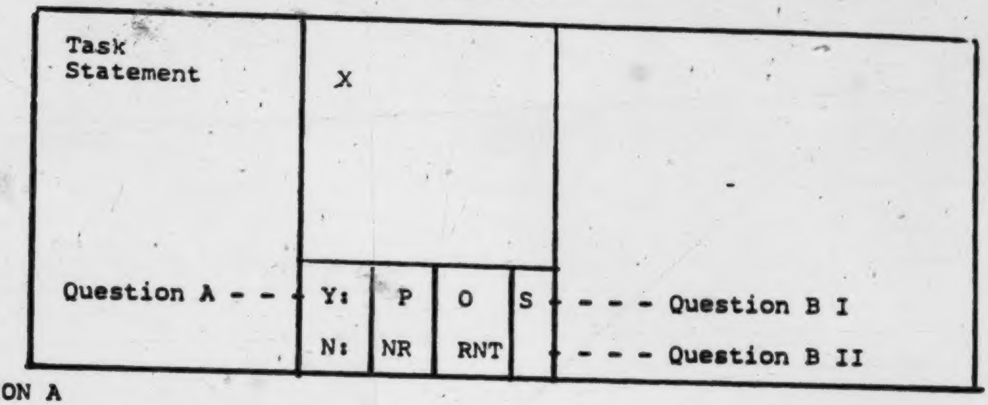
Rank the Bands numerically by placing 1 in the Band that you feel is the MOST IMPORTANT generic skill that you need in order to function in your job. Then rank number 2 for the second most important Band or generic skill and so on until you have ranked all the vertical Bands on the Profile Chart.

STEP THREE

Now return to Band A of the Profile Chart and rank these tasks in order of importance for you to function in your job. Read the tasks which are identified horizontally and belong to that specific Band and place number 1 under the task you feel is the most important and then place number 2 in your second choice and so on until you have ranked all the tasks in that Band.

STEP FOUR

You will notice that each Task Statement has space below it for completion of further information. You are asked 2 questions for each Task Statement.



QUESTION A

Do you do this Task in your job?

If YES, circle the "Y" and go to QUESTION BI.

If NO, circle the "N" and go the Question BII.

QUESTION B I

Where did you learn this TASK?

Circle the appropriate response. Circle ONE only.

P prior to entering the field you are working in

O I learned to perform this Task on-the-job

S I learned to perform this Task by attending seminars, taking courses, workshops

QUESTION II

Which of the following statements describes why you do not perform this Task? Circle the appropriate response.

NR the Task is not relevant in order for me to perform in my job

RNT the Task is relevant to my job but I require additional training

Let's look at an example:

1.

Dispense the frame to the patient

Question A

Y: P O S - - - - - - - - - Question B I

N: NR RNT - - - - - - - - - Question B II

Question A - Do you do this Task in your job?

Question B I- Where did you learn this Task?

Question BII- Which of the following statements describes why you do not perform this Task?

STEP FIVE
Repeat steps three through four until you have finished each Band on your Profile Chart.

STEP SIX
Repeat steps one through four until you have finished the second Profile Chart.

STEP SEVEN
In the space provided which is located at the top of the Profile Chart, I would like you include your name, occupational title and the office you are employed by.

STEP EIGHT
Return both the completed Profile Charts in the enclosed stamped self-addressed envelope as soon as your have finished.

DEPARTMENT OF INDUSTRIAL
AND VOCATIONAL EDUCATION
FACULTY OF EDUCATION
THE UNIVERSITY OF ALBERTA

January 14, 1985

Dear Optometric Practitioner:

Early in December 1984, I mailed to your office an occupational profile chart for an optometric receptionist and an occupational profile chart for an optometric assistant along with a covering letter asking your optometric auxiliary staff to participate in an occupational task analysis.

Several of you and your staff have responded generously, however, in an attempt to secure sufficient data I have extended the time limit to early February.

In the event that some of you have misplaced the instructions and charts, please feel free to phone me at 429-0029 and leave a message for me to mail you another set.

Yours truly,

Marlowe Lindberg

Marlowe Lindberg, B. Ed.

645 EDUCATION SOUTH, EDMONTON, ALBERTA, CANADA • T6G 2G5 • TELEPHONE (403) 432-3678

APPENDIX F

Data from the Frequency Count from the Validated Profile of Occupational Skills and Tasks for the Optometric Receptionists and the Optometric Assistants

RANKING FOR THE SKILLS FROM THE VALIDATED RESPONSES FOR THE RECEPTIONISTS' PROFILE

N = 52

SKILL STATEMENTS	A	B	C	D	E	F	G	H	I	J	K	L	M	N
RANK	f	f	f	f	f	f	f	f	f	f	f	f	f	f
1	26	15	2	4	0	0	0	1	2	0	0	0	0	0
2	12	22	12	1	1	0	0	2	1	0	0	0	0	0
3	6	7	19	14	1	0	0	1	1	0	1	0	0	1
4	1	4	10	20	4	2	2	4	4	1	1	0	0	0
5	2	2	2	8	10	3	4	4	9	2	5	0	0	0
6	2	0	3	2	8	6	6	8	5	3	3	0	3	2
7	0	1	2	1	8	5	3	7	6	3	7	0	4	4
8	0	0	0	1	4	5	6	10	4	8	5	2	5	1
9	0	0	1	0	3	5	4	2	12	6	10	4	0	4
10	0	0	0	0	6	3	6	4	1	11	7	3	3	7
11	2	0	0	0	1	3	5	3	3	7	5	4	10	8
12	0	0	0	0	3	4	4	3	1	5	4	9	8	10
13	0	0	0	0	0	6	4	1	2	3	1	11	13	10
14	0	0	0	0	2	9	7	1	2	2	2	18	4	4

RANKING FOR THE TASKS FROM THE VALIDATED RESPONSES FOR THE RECEPTIONISTS' PROFILE

N = 52

TASK STATEMENT	A1	A2	A3	A4	A5	A6	A7	A8	A9	A10	A11
RANK	f	f	f	f	f	f	f	f	f	f	f
1	31	3	0	3	8	6	4	0	0	0	0
2	7	6	6	8	14	7	0	1	0	0	2
3	6	6	7	6	7	12	2	1	0	2	2
4	2	7	10	14	8	5	2	1	0	0	3
5	2	6	15	4	10	5	1	5	2	0	3
6	2	8	4	11	3	7	7	3	3	3	2
7	1	7	5	4	1	3	11	12	3	2	2
8	1	0	0	2	0	2	5	12	13	5	9
9	0	2	2	1	0	1	7	6	15	10	8
10	0	2	3	0	0	2	6	5	6	19	11
11	0	5	2	0	0	1	8	4	8	11	9

TASK STATEMENT	B1	B2	B3	B4	B5
RANK	f	f	f	f	f
1	14	16	13	7	2
2	9	14	8	14	7
3	10	8	10	14	10
4	7	9	11	13	12
5	12	5	10	4	21

TASK STATEMENT	C1	C2	C3	C4	C5	C6	C7	C8	C9
RANK	f	f	f	f	f	f	f	f	f
1	23	1	1	2	21	2	0	1	0
2	21	6	7	3	12	1	0	1	1
3	1	11	18	4	5	9	0	3	0
4	5	7	13	10	3	11	0	4	0
5	1	10	9	13	5	8	1	5	0
6	1	5	3	9	3	17	3	8	4
7	0	7	1	6	2	2	16	16	3
8	0	5	0	4	1	1	18	13	11
9	0	0	0	1	0	0	14	2	33

RANKING FOR THE TASKS FROM THE VALIDATED RESPONSES FOR THE RECEPTIONISTS' PROFILE

N = 52

TASK STATEMENT	D1	D2	D3	D4	D5	D6	D7
RANK	f	f	f	f	f	f	f
1	**31**	5	0	3	11	0	0
2	10	**20**	3	1	13	7	0
3	3	10	6	2	**14**	13	4
4	2	8	10	5	10	**14**	3
5	2	6	**16**	12	2	11	3
6	4	2	14	10	2	3	17
7	0	1	3	**19**	0	4	**25**

TASK STATEMENT	E1	E2	E3	E4	E5	E6	E7	E8	E9	E10
RANK	f	f	f	f	f	f	f	f	f	f
1	5	12	**26**	6	3	0	0	0	0	0
2	2	10	15	**17**	1	3	2	1	1	0
3	2	**15**	5	13	6	3	3	3	1	1
4	4	3	4	8	**11**	8	11	1	2	0
5	4	5	1	1	7	**13**	9	11	1	1
6	1	2	1	2	3	7	**12**	7	10	6
7	4	2	0	3	4	4	7	**14**	9	5
8	6	2	0	1	4	3	2	6	**13**	**14**
9	7	1	0	1	6	5	6	3	13	11
10	**18**	0	0	0	7	6	0	6	2	14

TASK STATEMENT	F1	F2	F3	F4	F5	F6	F7	F8
RANK	f	f	f	f	f	f	f	f
1	**43**	2	2	1	1	0	0	1
2	1	**24**	13	6	1	0	1	3
3	2	10	**14**	**12**	3	5	0	4
4	0	5	5	11	8	3	1	4
5	0	6	5	4	**12**	**15**	2	7
6	1	0	5	7	10	14	0	4
7	1	1	4	5	7	2	8	**13**
8	1	1	1	3	7	0	**16**	13

RANKING FOR THE TASKS FROM THE VALIDATED RESPONSES FOR THE RECEPTIONISTS' PROFILE

N = 52

TASK

STATEMENT	G1	G2	G3	G4	G5	G6	G7	G8	G9
RANK	f	f	f	f	f	f	f	f	f
1	**36**	5	2	0	4	0	0	0	0
2	6	**30**	3	0	3	4	0	0	2
3	3	8	**22**	2	10	2	0	1	4
4	0	4	7	9	**12**	11	2	1	8
5	2	1	6	5	11	**13**	2	0	**9**
6	1	0	1	7	4	11	6	10	5
7	0	0	3	9	1	7	10	13	5
8	1	0	2	7	2	0	**17**	**14**	7
9	0	1	3	10	2	1	12	**10**	7

TASK

STATEMENT	H1	H2	H3	H4	H5	H6	H7
RANK	f	f	f	f	f	f	f
1	7	12	10	2	13	5	1
2	0	14	**14**	2	**18**	7	1
3	1	4	**18**	15	5	6	3
4	3	5	6	**18**	9	6	5
5	7	6	4	9	3	8	14
6	13	7	0	6	4	**13**	10
7	**21**	4	0	0	0	7	**18**

TASK

STATEMENT	I1	I2	I3	I4
RANK	f	f	f	f
1	**20**	21	2	9
2	14	**22**	2	14
3	16	5	11	21
4	2	4	**37**	8

RANKING FOR THE TASKS FROM THE VALIDATED RESPONSES FOR THE RECEPTIONISTS' PROFILE

N = 52

TASK

STATEMENT	J1	J2	J3	J4	J5
RANK	f	f	f	f	f
1	**39**	2	2	8	0
2	6	**20**	10	12	3
3	3	14	12	16	6
4	2	10	**18**	12	9
5	1	5	9	3	**33**

TASK

STATEMENT	K1	K2	K3	K4	K5	K6	K7	K8	K9	K10	K11	K12
RANK	f	f	f	f	f	f	f	f	f	f	f	f
1	**23**	0	5	5	8	1	2	0	3	1	1	0
2	7	**9**	6	**11**	4	3	0	0	5	5	0	0
3	8	5	5	8	**11**	5	3	0	2	1	3	0
4	5	6	**9**	8	3	4	4	0	4	4	4	0
5	4	8	6	8	9	2	4	4	5	2	1	0
6	2	7	3	4	7	**9**	5	5	5	1	1	0
7	0	5	7	4	5	6	4	2	5	5	3	1
8	1	4	2	1	2	5	5	8	**7**	7	4	3
9	1	1	2	0	1	6	**9**	7	6	7	3	5
10	0	4	2	1	1	3	5	8	4	**11**	5	6
11	0	2	2	0	0	3	2	7	2	4	**19**	7
12	0	0	2	1	0	4	3	**10**	0	1	5	**27**

TASK

STATEMENT	L1	L2	L3	L4	L5	L6	L7
RANK	f	f	f	f	f	f	f
1	**32**	10	1	2	1	0	5
2	13	**19**	5	4	2	8	0
3	3	9	**14**	5	4	12	3
4	2	5	11	**15**	3	10	8
5	2	3	12	11	14	8	7
6	1	4	6	10	**18**	10	2
7	0	3	4	6	10	4	**26**

RANKING FOR THE TASKS FROM THE VALIDATED RESPONSES FOR THE RECEPTIONISTS' PROFILE

N = 52

TASK STATEMENT	M1	M2	M3	M4	M5	M6	M7	M8
RANK	f	f	f	f	f	f	f	f
1	21	6	16	3	1	2	1	1
2	14	15	13	5	1	2	0	2
3	10	16	14	8	1	1	1	4
4	5	7	2	24	8	1	2	4
5	0	3	3	9	22	4	2	9
6	1	3	2	2	8	8	4	22
7	1	1	2	1	4	27	8	9
8	0	1	0	0	7	7	34	4

TASK STATEMENT	N1	N2	N3	N4	N5	N6
RANK	f	f	f	f	f	f
1	24	18	5	0	2	3
2	2	17	20	1	6	5
3	4	8	18	12	5	5
4	8	5	7	16	12	6
5	4	4	2	14	17	11
6	10	0	0	9	10	22

RANKING FOR THE SKILLS FROM THE VALIDATED RESPONSES FOR THE ASSISTANTS' PROFILE

N = 38

SKILL STATEMENTS	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
RANK	f	f	f	f	f	f	f	f	f	f	f	f	f	f	f	f	f	f
1	3	17	0	4	4	0	3	13	0	0	0	0	1	2	0	0	0	0
2	3	5	2	2	6	5	5	1	2	1	0	1	1	1	1	2	0	0
3	2	3	2	3	3	7	5	2	0	5	2	0	2	2	0	0	0	0
4	3	2	2	4	8	3	5	3	5	1	0	0	0	0	1	0	0	1
5	0	1	3	0	3	3	8	4	4	1	2	2	3	0	1	2	0	1
6	3	2	0	3	1	3	2	5	5	4	0	2	2	0	1	4	0	1
7	5	3	2	2	0	4	2	3	5	3	2	3	2	0	0	1	1	0
8	3	0	3	2	1	4	1	4	1	4	3	3	4	1	0	3	1	0
9	0	0	4	3	1	0	1	7	3	7	0	2	2	1	2	3	1	1
10	1	0	2	1	5	1	2	2	2	4	7	1	4	1	3	1	0	1
11	0	3	0	1	1	4	1	1	0	1	3	5	4	2	1	4	3	0
12	4	0	1	1	0	1	1	4	1	2	4	6	3	1	2	5	0	3
13	1	0	1	2	3	2	1	0	2	1	7	4	2	2	1	5	0	4
14	3	0	6	4	1	0	0	0	2	1	2	6	2	3	2	2	2	2
15	3	1	2	2	1	0	0	1	0	1	2	1	3	6	8	1	2	4
16	1	1	2	2	0	1	0	0	0	1	2	1	3	8	8	4	2	2
17	3	0	1	1	0	0	0	0	2	1	0	1	0	7	3	1	10	8
18	0	0	2	1	0	0	1	0	1	0	2	0	1	2	2	0	16	10

RANKING FOR THE TASKS FROM THE VALIDATED RESPONSES FOR THE ASSISTANTS' PROFILE

N = 38

TASK

STATEMENT	A1	A2	A3	A4	A5
RANK	f	f	f	f	f
1	11	2	22	1	2
2	5	13	3	10	7
3	10	10	11	4	3
4	9	7	2	16	4
5	3	6	0	7	22

TASK

STATEMENT	B1	B2	B3	B4	B5	B6	B7	B8	B9	B10	B11
RANK	f	f	f	f	f	f	f	f	f	f	f
1	12	8	1	11	1	2	0	1	0	1	1
2	6	9	3	5	1	7	3	1	2	1	0
3	5	6	3	6	2	5	5	0	4	0	2
4	4	6	8	1	6	6	6	0	0	0	1
5	2	4	4	6	2	8	7	2	1	0	2
6	5	1	2	3	7	2	9	3	4	2	0
7	1	2	6	0	6	4	5	10	2	2	0
8	1	0	3	2	3	4	3	8	10	4	0
9	2	1	3	1	4	0	0	8	9	4	6
10	0	1	0	2	4	0	0	5	5	11	10
11	0	0	5	0	2	0	0	0	1	13	16

TASK

STATEMENT	C1	C2	C3	C4	C5
RANK	f	f	f	f	f
1	13	10	3	5	7
2	9	11	6	4	8
3	8	7	10	8	5
4	4	8	10	9	7
5	4	2	9	12	11

RANKING FOR THE TASKS FROM THE VALIDATED RESPONSES FOR THE ASSISTANTS' PROFILE

N = 38

TASK STATEMENT	D1	D2	D3	D4	D5	D6	D7	D8	D9	D10
RANK	f	f	f	f	f	f	f	f	f	f
1	10	6	12	10	0	0	0	0	0	0
2	7	8	9	7	1	1	2	1	0	2
3	7	3	8	7	3	4	0	4	0	2
4	3	6	0	9	5	4	2	2	2	5
5	3	3	4	5	8	4	2	4	3	4
6	4	3	2	1	6	6	8	2	2	4
7	1	3	2	0	5	6	5	9	1	4
8	0	3	0	1	4	6	9	8	4	3
9	1	1	1	0	2	4	7	6	13	3
10	2	2	0	0	4	3	3	2	11	11

TASK STATEMENT	E1	E2	E3	E4	E5	E6	E7	E8	E9
RANK	f	f	f	f	f	f	f	f	f
1	18	1	6	4	0	7	1	0	1
2	9	8	9	3	0	7	1	0	1
3	3	8	11	2	2	9	0	0	3
4	4	4	5	9	4	3	5	1	3
5	1	9	4	3	7	7	2	1	4
6	1	4	2	3	3	5	7	4	9
7	0	0	0	7	11	0	9	4	7
8	0	1	0	6	7	0	9	10	5
9	2	3	1	1	4	0	4	18	5

TASK STATEMENT	F1	F2	F3	F4	F5	F6	F7	F8	F9
RANK	f	f	f	f	f	f	f	f	f
1	30	0	0	4	2	1	0	1	0
2	5	4	5	8	9	4	1	0	2
3	0	3	8	5	9	6	2	2	3
4	0	3	4	5	1	13	5	2	5
5	2	3	6	3	7	4	8	0	5
6	1	6	4	2	2	8	7	4	4
7	0	7	1	4	2	1	12	7	4
8	0	4	4	2	3	1	3	13	8
9	0	8	5	5	3	0	0	9	7

RANKING FOR THE TASKS FROM THE VALIDATED RESONSES FOR THE ASSISTANTS' PROFILE

N = 38

TASK STATEMENT	G1	G2	G3	G4	G5	G6	G7	G8	G9	G10	G11
RANK	f	f	f	f	f	f	f	f	f	f	f
1	15	12	4	0	0	1	0	1	1	0	4
2	12	15	2	0	0	0	0	0	6	1	2
3	4	4	12	2	0	6	0	1	2	5	2
4	4	2	7	7	3	1	2	3	5	3	1
5	3	2	2	4	9	6	0	2	4	4	2
6	0	0	3	1	5	9	4	5	3	3	5
7	0	1	3	3	7	7	4	5	4	3	1
8	0	0	2	5	6	2	4	5	5	3	6
9	0	1	2	5	2	6	3	6	3	4	6
10	0	0	1	7	4	0	5	6	3	7	5
11	0	1	0	4	2	0	16	4	2	5	4

TASK STATEMENT	H1	H2	H3	H4
RANK	f	f	f	f
1	34	1	2	1
2	3	23	9	3
3	0	8	23	7
4	1	6	4	27

TASK STATEMENT	I1	I2	I3	I4	I5	I6
RANK	f	f	f	f	f	f
1	28	4	3	1	2	0
2	4	24	7	1	2	0
3	1	3	17	12	5	0
4	0	5	7	17	3	6
5	1	2	2	6	22	5
6	4	0	2	1	4	27

RANKING FOR THE TASKS FROM THE VALIDATED RESPONSES FOR THE ASSISTANTS' PROFILE

N = 38

TASK

STATEMENT	J1	J2	J3	J4	J5	J6
RANK	f	f	f	f	f	f
1	**18**	7	1	1	**11**	0
2	10	**8**	8	6	6	0
3	4	7	**12**	7	5	3
4	3	8	7	**11**	5	4
5	2	5	10	9	9	3
6	1	3	0	4	2	**28**

TASK

STATEMENT	K1	K2	K3	K4	K5	K6
RANK	f	f	f	f	f	f
1	8	**20**	4	1	5	0
2	**10**	10	8	8	1	1
3	6	3	**14**	4	10	1
4	1	3	9	**14**	9	2
5	4	1	2	11	**11**	9
6	9	1	1	0	2	**25**

TASK

STATEMENT	L1	L2	L3	L4
RANK	f	f	f	f
1	**30**	2	6	0
2	2	**18**	11	7
3	6	4	**20**	8
4	0	14	1	**23**

RANKING FOR THE TASKS FROM THE VALIDATED RESPONSES FOR THE ASSISTANTS' PROFILE

N = 38

TASK STATEMENT	M1	M2	M3	M4	M5	M6	M7	M8	M9
RANK	f	f	f	f	f	f	f	f	f
1	**14**	4	**13**	2	0	2	2	0	1
2	4	**13**	8	8	2	2	1	0	0
3	3	5	7	8	**9**	4	2	0	0
4	0	2	3	**12**	8	7	6	0	0
5	2	4	3	4	8	**11**	5	1	0
6	2	5	2	4	8	8	7	2	0
7	2	5	2	0	3	4	**13**	7	2
8	9	0	0	0	0	0	2	**22**	5
9	2	0	0	0	0	0	0	6	**30**

TASK STATEMENT	N1	N2	N3	N4	N5	N6	N7
RANK	f	f	f	f	f	f	f
1	**25**	3	3	3	1	3	0
2	4	**14**	7	6	1	1	5
3	2	3	**16**	6	6	4	1
4	2	2	6	**19**	6	1	2
5	2	4	5	3	**17**	6	1
6	2	3	1	1	6	**20**	5
7	1	9	0	0	1	3	**24**

TASK STATEMENT	O1	O2	O3	O4	O5	O6	O7	O8
RANK	f	f	f	f	f	f	f	f
1	**25**	9	0	3	0	0	1	0
2	3	**24**	4	2	3	1	0	1
3	3	1	**19**	7	3	2	3	0
4	3	1	3	**21**	4	4	1	1
5	1	0	9	2	**18**	3	4	1
6	1	1	1	2	6	**20**	4	3
7	1	0	1	1	2	8	**21**	4
8	1	2	1	0	2	0	4	**28**

RANKING FOR THE TASKS FROM THE VALIDATED RESPONSES FOR THE ASSISTANTS' PROFILE

N = 38

TASK STATEMENT	P1	P2	P3	P4	P5
RANK	f	f	f	f	f
1	**17**	2	3	16	0
2	10	**23**	2	2	1
3	10	8	6	14	0
4	1	4	**23**	6	4
5	0	1	4	0	**33**

TASK STATEMENT	Q1	Q2	Q3
RANK	f	f	f
1	**24**	11	3
2	11	**21**	6
3	3	6	**29**

TASK STATEMENT	R1	R2	R3	R4
RANK	f	f	f	f
1	**25**	2	11	0
2	13	9	**14**	2
3	0	**22**	10	6
4	0	5	3	**30**

CURRICULUM VITA

Name:	Marlowe Lindberg
Birth:	July 22, 1942, Dundee, Scotland
Education:	1986, University of Alberta, M.Ed. 1982, University of Alberta, B.Ed. Teacher Certification: Alberta Permanent Professional Certificate
Positions:	Clinic Director, Dr. R.C. Lindberg, Professional Corporation, 1986 Research Officer: Alberta Advanced Education, 1984 - 1986 Administrative Intern: Alberta Advanced Education, 1983 - 1984 Instructor: Northern Alberta Institution of Technology, 1982 -1983 Program Co-Ordinator/Instructor: Grant MacEwan College/Alberta Association of Optometrists, 1973 - 1975
Memberships:	Phi Delta Kappa (University Chapter) Epsilon Pi Tau (Alberta Chapter) Alberta Business Education Association Canadian Association of Business Education Teachers Canadian Vocational Association
Publications:	Teaching Teachers How to Teach Adults, Teacher's Manual for Singapore Government's Basic Education for Skills Training Program 1983, First Ed. and 1984, Second Ed.
Awards:	Internship: Alberta Advanced Education, 1983

CHART 1

PROFILE of OCCUPATIONAL SKILLS and TASKS for an OPTOMETRIC RECEPTIONIST

SKILL A **Interpersonal Skills** **RANK____**	A - 1 RECEIVE PATIENTS AND OFFICE VISITORS RANK:___ Y: P O S N: NR RNT	A - 2 WORK INDEPENDENTLY RANK:___ Y: P O S N: NR RNT	A - 3 ACT IN A DIPLOMATIC MANNER RANK:___ Y: P O S N: NR RNT	A - 4 DEVELOP SENSITIVITY TO PATIENTS NEEDS BY SHOWING CONCERN FOR THEIR FEELINGS RANK:___ Y: P O S N: NR RNT	A - 5 CREATE A FRIENDLY AND COMFORTABLE ATMOSPHERE RANK:___ Y: P O S N: NR RNT	A - 6 MAINTAIN EFFECTIVE WORKING RELATIONSHIPS WITH CO-WORKER(S) AND DOCTOR(S) BY BEING PART OF A TEAM RANK:___ Y: P O S N: NR RNT	A - 7 ACQUIRE A SENSE OF HUMOR RANK:___ Y: P O S N: NR RNT	A - 8 ADAPT TO AND DEAL WITH STRESS RANK:___ Y: P O S N: NR RNT	A - 9 IDENT UNDER NO CON RANK: Y: P N: NR
SKILL B **Dependability** **RANK____**	B - 1 ADHERE TO WORK TIME SCHEDULE RANK:___ Y: P O S N: NR RNT	B - 2 PROJECT A PROFESSIONAL PERSONAL APPEARANCE RANK:___ Y: P O S N: NR RNT	B - 3 KEEP PATIENT'S CONFIDENTIALITY RANK:___ Y: P O S N: NR RNT	B - 4 ORGANIZE YOUR WORK PRIORITIES RANK:___ Y: P O S N: NR RNT	B - 5 PRACTISE GOOD LISTENING SKILLS RANK:___ Y: P O S N: NR RNT				
SKILL C **Telephone Techniques** **RANK____**	C - 1 USE ACCEPTABLE TELEPHONE MANNERS RANK___ Y: P O S N: NR RNT	C - 2 IDENTIFY CALLER IN ORDER TO SCREEN TELEPHONE CALLS RANK___ Y: P O S N: NR RNT	C - 3 DETERMINE IF YOU CAN ASSIST THIS CALLER RANK___ Y: P O S N: NR RNT	C - 4 BE PERCEPTIVE WHEN SCREENING TELEPHONE, E.G. KNOW IF IT IS AN EMERGENCY RANK___ Y: P O S N: NR RNT	C - 5 ANSWER THE TELEPHONE PROMPTLY RANK___ Y: P O S N: NR RNT	C - 6 LISTEN CAREFULLY, TAKE NOTES AND DO NOT MAKE THE CALLER REPEAT REPEAT THE INFORMATION RANK___ Y: P O S N: NR RNT	C - 7 DEAL WITH TELEPHONE SHOPPERS RANK___ Y: P O S N: NR RNT	C - 8 KNOW HOW TO HANDLE TELEPHONE APPOINTMENT CANCELLATIONS RANK___ Y: P O S N: NR RNT	C - 9 KNOW TELEP RECAL RANK Y: P N: N
SKILL D **Appointment Management** **RANK____**	D - 1 DETERMINE THE PATIENT'S NEEDS WHEN THEY ARE MAKING APPOINTMENTS RANK___ Y: P O S N: NR RNT	D - 2 KNOW THE TIME REQUIRED FOR THE PATIENT'S APPOINTMENTS RANK___ Y: P O S N: NR RNT	D - 3 RE-ARRANGE THE APPOINTMENT BOOK IN AN EMERGENCY RANK___ Y: P O S N: NR RNT	D - 4 TELEPHONE PATIENTS TO CONFIRM APPOINTMENTS FOR THE NEXT DAY RANK___ Y: P O S N: NR RNT	D - 5 ALWAYS OBTAIN THE PATIENT'S NAME AND TELEPHONE NUMBER. RANK___ Y: P O S N: NR RNT	D - 6 FIND OUT IF THE PATIENTS IS A NEW, REFERRED OR RE-CHECK PATIENT RANK___ Y: P O S N: NR RNT	D - 7 ESTABLISH A WAITING LIST FOR PATIENTS WHO CAN BE FITTED INTO CANCELLED APPOINTMENTS RANK___ Y: P O S N: NR RNT		
SKILL E **Terminology** **RANK____**	E - 1 KNOW THE HISTORICAL OVERVIEW OF THE OPTOMETRIC PROFESSION RANK___ Y: P O S N: NR RNT	E - 2 DISTINQUISH DIFFERENCES RE: AN OPTOMETRIST, OPHTHALMOLOGIST AND AN OPTICIAN RANK___ Y: P O S N: NR RNT	E - 3 DEFINE THE OPTOMETRIC SERVICES THAT YOUR OFFICE PROVIDES RANK___ Y: P O S N: NR RNT	E - 4 EXPLAIN THE FEE STRUCTURE OF YOUR OFFICE RANK___ Y: P O S N: NR RNT	E - 5 KNOW THE NAMES OF THE PARTS OF A FRAME RANK___ Y: P O S N: NR RNT	E - 6 KNOW THE DIFFERENT EYE GLASS LENS TYPES RANK___ Y: P O S N: NR RNT	E - 7 KNOW THE DIFFERENT TYPES OF CONTACT LENSES RANK___ Y: P O S N: NR RNT	E - 8 KNOW THE DIFFERENT TYPES OF CONTACT LENS SOLUTIONS RANK___ Y: P O S N: NR RNT	E - DEVEL OF T THE A EYE RANK Y: P N: N
SKILL F **Order Ophthalmic Frames & Lenses** **RANK____**	F - 1 KNOW HOW TO READ A PRESCRIPTION FROM A PATIENT'S FILE RANK___ Y: P O S N: NR RNT	F - 2 IDENTIFY FRAME PARTS SPECIFICATIONS RANK___ Y: P O S N: NR RNT	F - 3 KNOW WHICH DISTRIBUTORS AND/OR LABS FROM WHICH TO ORDER FRAMES AND LENSES RANK___ Y: P O S N: NR RNT	F - 4 PERFORM MINOR REPAIRS TO FRAMES RANK___ Y: P O S N: NR RNT	F - 5 USE A FRAME CATALOGUE RANK___ Y: P O S N: NR RNT	F - 6 KNOW HOW TO ORDER PARTS OF FRAMES RANK___ Y: P O S N: NR RNT	F - 7 KNOW HOW TO KEEP A RECORD OF YOUR FRAME STOCK RANK___ Y: P O S N: NR RNT	F - 8 KNOW HOW TO KEEP A RECORD OF ALL YOUR FRAME AND LENS ORDERS RANK___ Y: P O S N: NR RNT	
SKILL G **Ordering Contact Lenses** **RANK____**	G - 1 KNOW HOW TO READ A PATIENT'S CONTACT LENS CHART RANK___	G - 2 BE ABLE TO IDENTIFY THE TYPE OF CONTACT LENS FROM THE PATIENT'S CHARTS	G - 3 KNOW THE NAMES OF THE CONTACT LENS COMPANIES RE: REPLACEMENT POLICY AND DELIVERY DATES RANK___ Y: P O S N: NR RNT	G - 4 KEEP A RECORD OF YOUR CONTACT LENS STOCK RANK___ Y: P O S N: NR RNT	G - 5 KNOW HOW TO CARE FOR CONTACT LENSES RANK___ Y: P O S N: NR RNT	G - 6 HOW TO USE CONTACT LENS SOLUTIONS RANK___ Y: P O S N: NR RNT	G - 7 KEEP A RECORD OF YOUR CONTACT LENS SOLUTIONS THAT ARE IN STOCK RANK___ Y: P O S N: NR RNT	G - 8 KNOW HOW TO ORDER CONTACT LENS SOLUTIONS RANK___ Y: P O S N: NR RNT	G - KEEP CONTA RAN Y: N:
SKILL H **Record M** **RANK____**	P O S N: NR RNT	NG RANK___ Y: P O S N: NR RNT	H - 3 KNOW HOW TO CORRECTLY FILE AND RETRIEVE FILES FROM YOUR SYSTEM RANK___ Y: P O S N: NR RNT	H - 4 KNOW HOW TO FIND A LOST FILE WITHIN YOUR SYSTEM RANK___ Y: P O S N: NR RNT	H - 5 PREPARE CHARTS FOR NEW PATIENTS, REGULAR EYE EXAMS, CONTACT LENSES AND/OR VISUAL TRAINING RANK___ Y: P O S	H - 6 PREPARE DOCTOR'S DAY SHEET RANK___ Y: P O S N: NR RNT	H - 7 MAINTAIN AN UP-TO-DATE FILING SYSTEM BY PURGING YOUR FILES ON A REGULAR BASIS RANK___ Y: P O S N: NR RNT		

1 OF/DE

HART 1

PROFILE of OCCUPATIONAL SKILLS and TASKS for an OPTOMETRIC RECEPTIONIST

TLY	A - 3 ACT IN A DIPLOMATIC MANNER RANK:___ Y: P O S N: NR RNT	A - 4 DEVELOP SENSITIVITY TO PATIENTS NEEDS BY SHOWING CONCERN FOR THEIR FEELINGS RANK:___ Y: P O S N: NR RNT	A - 5 CREATE A FRIENDLY AND COMFORTABLE ATMOSPHERE RANK:___ Y: P O S N: NR RNT	A - 6 MAINTAIN EFFECTIVE WORKING RELATIONSHIPS WITH CO-WORKER(S) AND DOCTOR(S) BY BEING PART OF A TEAM RANK:___ Y: P O S N: NR RNT	A - 7 ACQUIRE A SENSE OF HUMOR RANK:___ Y: P O S N: NR RNT	A - 8 ADAPT TO AND DEAL WITH STRESS RANK:___ Y: P O S N: NR RNT	A - 9 IDENTIFY SITUATIONS UNDER WHICH YOU HAVE NO CONTROL RANK:___ Y: P O S N: NR RNT	A - 10 KNOW WHEN TO START/STOP A CONVERSATION RANK:___ Y: P O S N: NR RNT	A - 11 DON'T BE AFRAID TO ASK QUESTIONS RANK:___ Y: P O S N: NR RNT
RANCE	B - 3 KEEP PATIENT'S CONFIDENTIALITY RANK:___ Y: P O S N: NR RNT	B - 4 ORGANIZE YOUR WORK PRIORITIES RANK:___ Y: P O S N: NR RNT	B - 5 PRACTISE GOOD LISTENING SKILLS RANK:___ Y: P O S N: NR RNT						
IN	C - 3 DETERMINE IF YOU CAN ASSIST THIS CALLER RANK___ Y: P O S N: NR RNT	C - 4 BE PERCEPTIVE WHEN SCREENING TELEPHONE, E.G. KNOW IF IT IS AN EMERGENCY RANK___ Y: P O S N: NR RNT	C - 5 ANSWER THE TELEPHONE PROMPTLY RANK___ Y: P O S N: NR RNT	C - 6 LISTEN CAREFULLY, TAKE NOTES AND DO NOT MAKE THE CALLER REPEAT REPEAT THE INFORMATION RANK___ Y: P O S N: NR RNT	C - 7 DEAL WITH TELEPHONE SHOPPERS RANK___ Y: P O S N: NR RNT	C - 8 KNOW HOW TO HANDLE TELEPHONE APPOINTMENT CANCELLATIONS RANK___ Y: P O S N: NR RNT	C - 9 KNOW HOW TO USE THE TELEPHONE FOR RECALLS RANK___ Y: P O S N: NR RNT		
E	D - 3 RE-ARRANGE THE APPOINTMENT BOOK IN AN EMERGENCY RANK___ Y: P O S N: NR RNT	D - 4 TELEPHONE PATIENTS TO CONFIRM APPOINTMENTS FOR THE NEXT DAY RANK___ Y: P O S N: NR RNT	D - 5 ALWAYS OBTAIN THE PATIENT'S NAME AND TELEPHONE NUMBER. RANK___ Y: P O S N: NR RNT	D - 6 FIND OUT IF THE PATIENTS IS A NEW, REFERRED OR RE-CHECK PATIENT RANK___ Y: P O S N: NR RNT	D - 7 ESTABLISH A WAITING LIST FOR PATIENTS WHO CAN BE FITTED INTO CANCELLED APPOINTMENTS RANK___ Y: P O S N: NR RNT				
AN AND	E - 3 DEFINE THE OPTOMETRIC SERVICES THAT YOUR OFFICE PROVIDES RANK___ Y: P O S N: NR RNT	E - 4 EXPLAIN THE FEE STRUCTURE OF YOUR OFFICE RANK___ Y: P O S N: NR RNT	E - 5 KNOW THE NAMES OF THE PARTS OF A FRAME RANK___ Y: P O S N: NR RNT	E - 6 KNOW THE DIFFERENT EYE GLASS LENS TYPES RANK___ Y: P O S N: NR RNT	E - 7 KNOW THE DIFFERENT TYPES OF CONTACT LENSES RANK___ Y: P O S N: NR RNT	E - 8 KNOW THE DIFFERENT TYPES OF CONTACT LENS SOLUTIONS RANK___ Y: P O S N: NR RNT	E - 9 DEVELOP A VOCABULARY OF TERMS RELATING TO THE ANATOMY OF THE EYE RANK___ Y: P O S N: NR RNT	E - 10 MAINTAIN A DICTIONARY OF OPTOMETRIC TERMS RANK___ Y: P O S N: NR RNT	
ARTS	F - 3 KNOW WHICH DISTRIBUTORS AND/OR LABS FROM WHICH TO ORDER FRAMES AND LENSES RANK___ Y: P O S N: NR RNT	F - 4 PERFORM MINOR REPAIRS TO FRAMES RANK___ Y: P O S N: NR RNT	F - 5 USE A FRAME CATALOGUE RANK___ Y: P O S N: NR RNT	F - 6 KNOW HOW TO ORDER PARTS OF FRAMES RANK___ Y: P O S N: NR RNT	F - 7 KNOW HOW TO KEEP A RECORD OF YOUR FRAME STOCK RANK___ Y: P O S N: NR RNT	F - 8 KNOW HOW TO KEEP A RECORD OF ALL YOUR FRAME AND LENS ORDERS RANK___ Y: P O S N: NR RNT			
IFY ACT	G - 3 KNOW THE NAMES OF THE CONTACT LENS COMPANIES RE: REPLACEMENT POLICY AND DELIVERY DATES RANK___ Y: P O S N: NR RNT	G - 4 KEEP A RECORD OF YOUR CONTACT LENS STOCK RANK___ Y: P O S N: NR RNT	G - 5 KNOW HOW TO CARE FOR CONTACT LENSES RANK___ Y: P O S N: NR RNT	G - 6 HOW TO USE CONTACT LENS SOLUTIONS RANK___ Y: P O S N: NR RNT	G - 7 KEEP A RECORD OF YOUR CONTACT LENS SOLUTIONS THAT ARE IN STOCK RANK___ Y: P O S N: NR RNT	G - 8 KNOW HOW TO ORDER CONTACT LENS SOLUTIONS RANK___ Y: P O S N: NR RNT	G - 9 KEEP A RECORD OF ALL CONTACT LENS ORDERS RANK___ Y: P O S N: NR RNT		
NG	H - 3 KNOW HOW TO CORRECTLY FILE AND RETRIEVE FILES FROM YOUR SYSTEM RANK___ Y: P O S N: NR RNT	H - 4 KNOW HOW TO FIND A LOST FILE WITHIN YOUR SYSTEM RANK___ Y: P O S N: NR RNT	H - 5 PREPARE CHARTS FOR NEW PATIENTS, REGULAR EYE EXAMS, CONTACT LENSES AND/OR VISUAL TRAINING RANK___ Y: P O S N: NR RNT	H - 6 PREPARE DOCTOR'S DAY SHEET RANK___ Y: P O S N: NR RNT	H - 7 MAINTAIN AN UP-TO-DATE FILING SYSTEM BY PURGING YOUR FILES ON A REGULAR BASIS RANK___ Y: P O S N: NR RNT				

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RANK____	Y: P O S N: NR RNT	N: NR RNT	LENSES RANK___ Y: P O S N: NR RNT	N: NR RNT	N: NR RNT	N: NR RNT	Y: P O S N: NR RNT	RANK___ Y: P O S N: NR RNT
SKILL G **Ordering Contact Lenses** **RANK____**	G - 1 KNOW HOW TO READ A PATIENT'S CONTACT LENS CHART RANK___ Y: P O S N: NR RNT	G - 2 BE ABLE TO IDENTIFY THE TYPE OF CONTACT LENS FROM THE PATIENT'S CHARTS RANK___ Y: P O S N: NR RNT	G - 3 KNOW THE NAMES OF THE CONTACT LENS COMPANIES RE: REPLACEMENT POLICY AND DELIVERY DATES RANK___ Y: P O S N: NR RNT	G - 4 KEEP A RECORD OF YOUR CONTACT LENS STOCK RANK___ Y: P O S N: NR RNT	G - 5 KNOW HOW TO CARE FOR CONTACT LENSES RANK___ Y: P O S N: NR RNT	G - 6 HOW TO USE CONTACT LENS SOLUTIONS RANK___ Y: P O S N: NR RNT	G - 7 KEEP A RECORD OF YOUR CONTACT LENS SOLUTIONS THAT ARE IN STOCK RANK___ Y: P O S N: NR RNT	G - 8 KNOW HOW TO ORDER CONTACT LENS SOLUTIONS RANK___ Y: P O S N: NR RNT
SKILL H **Record Management** **RANK____**	H - 1 UNDERSTAND AND COMPARE DIFFERENT FILING SYSTEMS RANK___ Y: P O S N: NR RNT	H - 2 SET UP AN APPROPRIATE FILING SYSTEM FOR YOUR OFFICE RANK___ Y: P O S N: NR RNT	H - 3 KNOW HOW TO CORRECTLY FILE AND RETRIEVE FILES FROM YOUR SYSTEM RANK___ Y: P O S N: NR RNT	H - 4 KNOW HOW TO FIND A LOST FILE WITHIN YOUR SYSTEM RANK___ Y: P O S N: NR RNT	H - 5 PREPARE CHARTS FOR NEW PATIENTS, REGULAR EYE EXAMS, CONTACT LENSES AND/OR VISUAL TRAINING RANK___ Y: P O S N: NR RNT	H - 6 PREPARE DOCTOR'S DAY SHEET RANK___ Y: P O S N: NR RNT	H - 7 MAINTAIN AN UP-TO-DATE FILING SYSTEM BY PURGING YOUR FILES ON A REGULAR BASIS RANK___ Y: P O S N: NR RNT	
SKILL I **General Office Procedures** **RANK____**	I - 1 PROCESS AND DEAL WITH GOODS RECEIVED FROM COURIER SERVICE (LAB DELIVERIES) RANK___ Y: P O S N: NR RNT	I - 2 PROCESS INCOMING MAIL RANK___ Y: P O S N: NR RNT	I - 3 KNOW WHICH IS THE BEST COURIER SERVICES FOR YOUR OFFICE RANK___ Y: P O S N: NR RNT	I - 4 KNOW THE MAILING PROCEDURES USED BY YOUR OFFICE, FOR EXAMPLE: C.O.D., PARCEL POST, REGISTERED MAIL RANK___ Y: P O S N: NR RNT				
SKILL J **Typing** **RANK____**	J - 1 TYPE THE ALBERTA HEALTH CARE FORMS RANK___ Y: P O S N: NR RNT	J - 2 TYPE STATEMENTS (ACCOUNTS PAYABLE) RANK___ Y: P O S N: NR RNT	J - 3 TYPE RECALL CARDS RANK___ Y: P O S N: NR RNT	J - 4 TYPE REFERRAL LETTERS TO OTHER PRACTITIONERS RANK___ Y: P O S N: NR RNT	J - 5 TYPE MEMOS RANK___ Y: P O S N: NR RNT			
SKILL K **Accounting** **RANK____**	K - 1 KNOW HOW TO COLLECT FEES RANK___ Y: P O S N: NR RNT	K - 2 KNOW HOW TO COLLECT BAD DEBTS RANK___ Y: P O S N: NR RNT	K - 3 PROCESS YOUR OFFICE'S BANKING PROCEDURES RANK___ Y: P O S N: NR RNT	K - 4 RECORD YOUR OFFICES ACCOUNTS RECEIVABLE RANK___ Y: P O S N: NR RNT	K - 5 UNDERSTAND HOW TO FILL OUT 3RD PARTY PAYMENTS, SUCH AS: A.H.C., SOCIAL ASSISTANCE ETC. RANK___ Y: P O S N: NR RNT	K - 6 RECORD AND PAY YOUR OFFICE'S ACCOUNTS PAYABLE RANK___ Y: P O S N: NR RNT	K - 7 RECORD AND BALANCE YOUR PETTY CASH RANK___ Y: P O S N: NR RNT	K - 8 PROCESS YOU OFFICE'S PAYROLL, FOR EXAMPLE: UIC, INCOME TAX, C.P.P., ECT. RANK___ Y: P O S N: NR RNT
SKILL L **Use & Operate Business Machines** **RANK____**	L - 1 USE A CALCULATOR RANK___ Y: P O S N: NR RNT	L - 2 USE A TELEPHONE ANSWERING MACHINE RANK___ Y: P O S N: NR RNT	L - 3 UTILIZE A DICTAPHONE RANK___ Y: P O S N: NR RNT	L - 4 OPERATE A POSTAGE METER RANK___ Y: P O S N: NR RNT	L - 5 OPERATE A CHEQUE WRITER RANK___ Y: P O S N: NR RNT	L - 6 OPERATE A PHOTO COPIER RANK___ Y: P O S N: NR RNT	L - 7 USE AND OPERATE A COMPUTER RANK___ Y: P O S N: NR RNT	
SKILL M **Inner Office Maintenance** **RANK____**	M - 1 MAINTAIN A CLEARN AND TIDY WAITING ROOM RANK___ Y: P O S N: NR RNT	M - 2 KEEP YOUR OFFICE EQUIPMENT IN GOOD WORKING ORDER RANK___ Y: P O S N: NR RNT	M - 3 KEEP YOUR DOCTOR'S EQUIPMENT CLEAN RANK___ Y: P O S N: NR RNT	M - 4 ORDER PRINTING SUPPLIES, OFFICE STATIONERY, ETC. RANK___ Y: P O S N: NR RNT	M - 5 ORDER TECHNICAL SUPPLIES RANK___ Y: P O S N: NR RNT	M - 6 WATER THE PLANTS REGULARLY RANK___ Y: P O S N: NR RNT	M - 7 KNOW HOW TO MAKE COFFEE RANK___ Y: P O S N: NR RNT	M - 8 ORDER OFFICE SUPPLIES, E.G., SOAP, TOWELS, MAGAZINES, COFFEE RANK___ Y: P O S N: NR RNT
SKILL N **Writing** **RANK____**	N - 1 COMPOSE A SIMPLE BUSINESS LETTER RANK___ Y: P O S N: NR RNT	N - 2 USE PROPER GRAMMAR RANK___ Y: P O S N: NR RNT	N - 3 USE PROPER SPELLING RANK___ Y: P O S N: NR RNT	**N - 4** **USE PROPER PUNCTUATION** **RANK____** **Y: P O S** **N: NR RNT**	**N - 5** **UNDERSTAND WHAT YOU HAVE WRITTEN** **RANK____** **Y: P O S** **N: NR RNT**	**N - 6** **PROOFREAD YOUR WORK** **RANK____** **Y: P O S** **N: NR RNT**		

NAME:____________________

OFFICE:____________________

OCCUPATION:____________________

RETURN TO:
MARLOWE LINDBERG
7416 - 182nd Street
Edmonton, Alberta
T5T - 2G7

LEGEND:

Y: Yes, I perform th
P: I learned this ta
O: I learned this ta
S: I learned this ta
N: No, I do not perf
NR: I do not perform
relevent to my jo
RNT: I do not perform
further training

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ORDER FRAMES AND
LENSES
RANK___
Y: P O S
N: NR RNT

N: NR RNT

N: NR RNT

N: NR RNT

Y: P O S
N: NR RNT

RANK___
Y: P O S
N: NR RNT

G - 3
KNOW THE NAMES OF
THE CONTACT LENS
COMPANIES RE:
REPLACEMENT POLICY
AND DELIVERY DATES
RANK___
Y: P O S
N: NR RNT

G - 4
KEEP A RECORD OF
YOUR CONTACT LENS
STOCK
RANK___
Y: P O S
N: NR RNT

G - 5
KNOW HOW TO CARE FOR
CONTACT LENSES
RANK___
Y: P O S
N: NR RNT

G - 6
HOW TO USE CONTACT
LENS SOLUTIONS
RANK___
Y: P O S
N: NR RNT

G - 7
KEEP A RECORD OF
YOUR CONTACT LENS
SOLUTIONS THAT ARE
IN STOCK
RANK___
Y: P O S
N: NR RNT

G - 8
KNOW HOW TO ORDER
CONTACT LENS
SOLUTIONS
RANK___
Y: P O S
N: NR RNT

G - 9
KEEP A RECORD OF ALL
CONTACT LENS ORDERS
RANK___
Y: P O S
N: NR RNT

H - 3
KNOW HOW TO
CORRECTLY FILE AND
RETRIEVE FILES FROM
YOUR SYSTEM
RANK___
Y: P O S
N: NR RNT

H - 4
KNOW HOW TO FIND A
LOST FILE WITHIN
YOUR SYSTEM
RANK___
Y: P O S
N: NR RNT

H - 5
PREPARE CHARTS FOR
NEW PATIENTS,
REGULAR EYE EXAMS,
CONTACT LENSES
AND/OR VISUAL
TRAINING
RANK___
Y: P O S
N: NR RNT

H - 6
PREPARE DOCTOR'S DAY
SHEET
RANK___
Y: P O S
N: NR RNT

H - 7
MAINTAIN AN
UP-TO-DATE FILING
SYSTEM BY PURGING
YOUR FILES ON A
REGULAR BASIS
RANK___
Y: P O S
N: NR RNT

I - 3
KNOW WHICH IS THE
BEST COURIER
SERVICES FOR YOUR
OFFICE
RANK___
Y: P O S
N: NR RNT

I - 4
KNOW THE MAILING
PROCEDURES USED BY
YOUR OFFICE, FOR
EXAMPLE: C.O.D.,
PARCEL POST,
REGISTERED MAIL
RANK___
Y: P O S
N: NR RNT

J - 3
TYPE RECALL CARDS
RANK___
Y: P O S
N: NR RNT

J - 4
TYPE REFERRAL
LETTERS TO OTHER
PRACTITIONERS
RANK___
Y: P O S
N: NR RNT

J - 5
TYPE MEMOS
RANK___
Y: P O S
N: NR RNT

K - 3
PROCESS YOUR
OFFICE'S BANKING
PROCEDURES
RANK___
Y: P O S
N: NR RNT

K - 4
RECORD YOUR OFFICES
ACCOUNTS RECEIVABLE
RANK___
Y: P O S
N: NR RNT

K - 5
UNDERSTAND HOW TO
FILL OUT 3RD PARTY
PAYMENTS, SUCH AS:
A.H.C., SOCIAL
ASSISTANCE ETC.
RANK___
Y: P O S
N: NR RNT

K - 6
RECORD AND PAY YOUR
OFFICE'S ACCOUNTS
PAYABLE
RANK___
Y: P O S
N: NR RNT

K - 7
RECORD AND BALANCE
YOUR PETTY CASH
RANK___
Y: P O S
N: NR RNT

K - 8
PROCESS YOU OFFICE'S
PAYROLL, FOR
EXAMPLE: UIC,
INCOME TAX, C.P.P.,
ECT.
RANK___
Y: P O S
N: NR RNT

K - 9
KNOW WHAT YOUR CASH
FLOAT IS AND KNOW
HOW TO KEEP IT
BALANCED
RANK___
Y: P O S
N: NR RNT

K - 10
POST TO YOUR GENERAL
LEDGER AND KEEP IT
BALANCED
RANK___
Y: P O S
N: NR RNT

K - 11
PREPARE A BALANCE
SHEET
RANK___
Y: P O S
N: NR RNT

K - 12
PREPARE AN INCOME
STATEMENT
RANK___
Y: P O S
N: NR RNT

L - 3
UTILIZE A DICTAPHONE
RANK___
Y: P O S
N: NR RNT

L - 4
OPERATE A POSTAGE
METER
RANK___
Y: P O S
N: NR RNT

L - 5
OPERATE A CHEQUE
WRITER
RANK___
Y: P O S
N: NR RNT

L - 6
OPERATE A PHOTO
COPIER
RANK___
Y: P O S
N: NR RNT

L - 7
USE AND OPERATE A
COMPUTER
RANK___
Y: P O S
N: NR RNT

M - 3
KEEP YOUR DOCTOR'S
EQUIPMENT CLEAN
RANK___
Y: P O S
N: NR RNT

M - 4
ORDER PRINTING
SUPPLIES, OFFICE
STATIONERY, ETC.
RANK___
Y: P O S
N: NR RNT

M - 5
ORDER TECHNICAL
SUPPLIES
RANK___
Y: P O S
N: NR RNT

M - 6
WATER THE PLANTS
REGULARLY
RANK___
Y: P O S
N: NR RNT

M - 7
KNOW HOW TO MAKE
COFFEE
RANK___
Y: P O S
N: NR RNT

M - 8
ORDER OFFICE
SUPPLIES, E.G.,
SOAP, TOWELS,
MAGAZINES, COFFEE
RANK___
Y: P O S
N: NR RNT

N - 3
USE PROPER SPELLING
RANK___
Y: P O S
N: NR RNT

N - 4
USE PROPER
PUNCTUATION
RANK___
Y: P O S
N: NR RNT

N - 5
UNDERSTAND WHAT YOU
HAVE WRITTEN
RANK___
Y: P O S
N: NR RNT

N - 6
PROOFREAD YOUR WORK
RANK___
Y: P O S
N: NR RNT

NAME: ______________________

OFFICE: ______________________

OCCUPATION: ______________________

RETURN TO:
MARLOWE LINDBERG
7416 - 182nd Street
Edmonton, Alberta
T5T - 2G7

LEGEND:

Y: Yes, I perform this task.
P: I learned this task prior to entering the job.
O: I learned this task on-the-job.
S: I learned this task at an ad hoc course.
N: No, I do not perform this task.
NR: I do not perform this task becasue it is not relevant to my job.
RNT: I do not perform this task because I need further training in the area.

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OF/DE

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CHART 2

PROFILE of OCCUPATIONAL SKILLS and TASKS for an OPTOMETRIC ASSISTANT

SKILL A **Terminology** **RANK____**	A - 1 ANATOMY: DESCRIBE HOW THE EYE IS STRUCTURED AND BE ABLE TO IDENTIFY THE MAJOR PARTS OF AN EYE Y: P O S N: NR RNT RANK:___	A - 2 PHYSIOLOGY: DESCRIBE HOW THE EYE AND PARTS BASICALLY FUNCTION. RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	A - 3 DEFINITIONS: DEFINE AND UNDERSTAND COMMON TERMS THAT RELATE TO THE EYE AND VISION Y: P O S N: NR RNT RANK:___	A - 4 DEVELOP ENOUGH UNDERSTAND OF TERMINOLOGY THAT RELATES TO THE EYE TO DISTINGUISH A SIGN FROM A SYMPTOM RANK: Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	A - 5 RECOGNIZE THE BASIC FUNCTION OF OPHTHALMIC EQUIPMENT RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT				
SKILL B **Interpersonal Skills** **RANK____**	B - 1 MAINTAIN EFFECTIVE WORKING RELATIONSHIPS WITH CO-WORKER(S), PATIENT(S) AND DOCTOR(S) RANK: ___	B - 2 DEVELOP SENSITIVITY TO PATIENT'S NEEDS BY SHOWING CONCERN FOR THEIR FEELINGS RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	B - 3 ACT IN A DIPLOMATIC MANNER RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	B - 4 CREATE A FRIENDLY AND COMFORTABLE ATMOSPHERE RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	B - 5 BE SELECTIVE WITH WHAT YOU SAY TO A PATIENT AND KNOW YOUR LEGAL LIMITS RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	B - 6 HAVE GOOD COMMUNICATION SKILLS RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	B - 7 HAVE GOOD LISTENING SKILLS RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	B - 8 EXPLAIN THE ADVANTAGES OF ATTENDING AN OPTOMETRIC OFFICE WITH REGARD TO THE SERVICES YOUR OFFICE OFFERS RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	B - 9 DESCRIBE STRUCTUR APPLIED OFFICE RANK: Y: P O N: NR R
SKILL C **Handle Telephone** **RANK____**	C - 1 KEEP CONVERSATION GENERAL WHEN DEALING WITH TELEPHONE SHOPPERS RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	C - 2 LIMIT THE QUESTIONS AND ANSWERS WHEN DEALING WITH A TELEPHONE SHOPPER RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	C - 3 BE NONE COMMITTAL REGARDING FEES WHEN DEALING WITH A TELEPHONE SHOPPER RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	C - 4 SECURE THE TELEPHONE SHOPPER'S NAME AND PHONE NUMBER (SOMETIMES ADDRESS IN ORDER TO MAIL THEM INFORMATION) RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	C - 5 DIRECT THE TELEPHONE SHOPPER INTO YOUR OFFICE IN ORDER TO FURTHER ANSWER THEIR SPECIFIC QUESTIONS RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT				
SKILL D **Education for Assistants** **RANK____**	D - 1 COURSES IN COMMUNICATION SKILLS RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	D - 2 OFFICE MANAGEMENT TRAINING RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	D - 3 SEMINARS/COURSES TO UPDATE KNOWLEDGE AND TECHNOLOGY IN THE FIELD RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	D - 4 KEEP UP WITH NEW PRODUCT KNOWLEDGE RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	D - 5 COURSES IN TIME MANAGEMENT RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	D - 6 ASSERTIVE TRAINING RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	D - 7 STRESS MANAGEMENT COURSES RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	D -8 COURSES IN BASIC BEHAVIORAL PSYCHOLOGY RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	D - 9 HAVE KNO FIRST A RANK:___ Y: P O N: NR
SKILL E **Patient Education** **RANK____**	E - 1 EDUCATE PATIENTS ABOUT THE SERVICES AVAILABLE IN YOUR OFFICE RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	E - 2 EXPLAIN HOW THIRD PARTY BILLING FUNCTION, E.G. A.H.C., SOCIAL SERVICES ETC. RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	E - 3 ADVISE PATIENTS ABOUT THE TYPES OF LENSES AND FRAMES AVAILABLE RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	E - 4 WHEN DEALING WITH A PATIENT'S QUESTION UNDERSTAND THE LEGALITY OF YOUR STATEMENTS RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	E - 5 GIVE PATIENTS INFORMATION ABOUT REFERRALS TO OTHER HEALTH CARE OFFICES AND/OR HOSPITALS RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	E - 6 EXPLAIN THE IMPORTANCE OF A REGULAR EYE EXAMINATION RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	E - 7 EDUCATE PATIENTS IN THE CARE OF OPHTHALMIC APPLIANCES RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	E - 8 GIVE PATIENTS INSTRUCTIONS REGARDING LOW VISION AIDS RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	E - 9 EDUCATE ON THE HAVING OF EYE RANK: Y: P O N: NR
SKILL F **Lens Selection** **RANK____**	F - 1 KNOW HOW TO READ AND UNDERSTAND THE MEANING OF A PRESCRIPTION FROM A PATIENT'S CHART RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	F - 2 KNOW HOW LENSES ARE MANUFACTURED AND THE TIME REQUIRED FOR EACH STAGE OF DEVELOPMENT RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	F - 3 KNOW THE MATERIALS FROM WHICH LENSES ARE MADE RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	F - 4 BE ABLE TO ANALYZE LENSES USING A LENSMETER AND A LENS CLOCK RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	F - 5 UNDERSTAND THE FUNCTION OF PARTS OF A LENS, E.G. SPHERE, CYLINDER, PRISM RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	F - 6 KNOW THE TYPES OF SINGLE AND MULTIVISION LENSES RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	F - 7 KNOW THE AVAILABILITY OF LENSES RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	F - 8 KNOW HOW THE WARRANTY APPLIES TO LENSES E.G. HARDEX RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	F - 9 KNOW LE E.G. TI ETC. RANK: Y: P O N: NR
SKILL G **Frame Selection** **RANK____**			G - 3 UNDERSTAND THE COSMETICS OF FRAME SELECTION RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	G - 4 KNOW THE MATERIALS AND CONSTRUCTION OF A THE FRAME RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	G - 5 KNOW THE MANUFACTURERS OF THE FRAMES RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	G - 6 KNOW THE AVAILABILITY OF THE FRAMES RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	G - 7 KNOW THE COURIER SERVICES AVAILABLE FROM THE LABS RANK:___ Y: P $\overline{\mathrm{O\ S}}$ N: NR RNT	G - 8 BE ABLE TO READ THE FRAME MANUFACTURER'S CATALOGUE IN ORDER TO SELECT THE PROPER SIZE, COLOUR ETC. OF FRAME RANK:___ Y: P O S N: NR RNT	G - 9 KNOW HO PATIENT DISTANC TO CALC NEAR P. RANK: Y: P O N: NR

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CHART 2

PROFILE of OCCUPATIONAL SKILLS and TASKS for an OPTOMETRIC ASSISTANT

A - 3
DEFINITIONS: DEFINE AND UNDERSTAND COMMON TERMS THAT RELATE TO THE EYE AND VISION
Y: P O S
N: NR RNT
RANK:___

A - 4
DEVELOP ENOUGH UNDERSTAND OF TERMINOLOGY THAT RELATES TO THE EYE TO DISTINGUISH A SIGN FROM A SYMPTOM
RANK:___
Y: P O S
N: NR RNT

A - 5
RECOGNIZE THE BASIC FUNCTION OF OPHTHALMIC EQUIPMENT
RANK:___
Y: P O S
N: NR RNT

B - 3
ACT IN A DIPLOMATIC MANNER
RANK:___
Y: P O S
N: NR RNT

B - 4
CREATE A FRIENDLY AND COMFORTABLE ATMOSPHERE
RANK:___
Y: P O S
N: NR RNT

B - 5
BE SELECTIVE WITH WHAT YOU SAY TO A PATIENT AND KNOW YOUR LEGAL LIMITS
RANK:___
Y: P O S
N: NR RNT

B - 6
HAVE GOOD COMMUNICATION SKILLS
RANK:___
Y: P O S
N: NR RNT

B - 7
HAVE GOOD LISTENING SKILLS
RANK:___
Y: P O S
N: NR RNT

B - 8
EXPLAIN THE ADVANTAGES OF ATTENDING AN OPTOMETRIC OFFICE WITH REGARD TO THE SERVICES YOUR OFFICE OFFERS
RANK:___
Y: P O S
N: NR RNT

B - 9
DESCRIBE THE FEE STRUCTURE THAT IS APPLIED IN YOUR OFFICE
RANK:___
Y: P O S
N: NR RNT

B - 10
BE ABLE TO TROUBLESHOOT OPHTHALMIC APPLIANCE PROBLEMS
RANK:___
Y: P O S
N: NR RNT

B - 11
DEVELOP GOOD SALESMANSHIP TECHNIQUES
RANK:___
Y: P O S
N: NR RNT

C - 3
BE NONE COMMITTAL REGARDING FEES WHEN DEALING WITH A TELEPHONE SHOPPER
RANK:___
Y: P O S
N: NR RNT

C - 4
SECURE THE TELEPHONE SHOPPER'S NAME AND PHONE NUMBER (SOMETIMES ADDRESS IN ORDER TO MAIL THEM INFORMATION)
RANK:___
Y: P O S
N: NR RNT

C - 5
DIRECT THE TELEPHONE SHOPPER INTO YOUR OFFICE IN ORDER TO FURTHER ANSWER THEIR SPECIFIC QUESTIONS
RANK:___
Y: P O S
N: NR RNT

D - 3
SEMINARS/COURSES TO UPDATE KNOWLEDGE AND TECHNOLOGY IN THE FIELD
RANK:___
Y: P O S
N: NR RNT

D - 4
KEEP UP WITH NEW PRODUCT KNOWLEDGE
RANK:___
Y: P O S
N: NR RNT

D - 5
COURSES IN TIME MANAGEMENT
RANK:___
Y: P O S
N: NR RNT

D - 6
ASSERTIVE TRAINING
RANK:___
Y: P O S
N: NR RNT

D - 7
STRESS MANAGEMENT COURSES
RANK:___
Y: P O S
N: NR RNT

D - 8
COURSES IN BASIC BEHAVIORAL PSYCHOLOGY
RANK:___
Y: P O S
N: NR RNT

D - 9
HAVE KNOWLEDGE OF FIRST AID
RANK:___
Y: P O S
N: NR RNT

D - 10
RECORD MANAGEMENT COURSES (FILING SYSTEMS)
RANK:___
Y: P O S
N: NR RNT

E - 3
ADVISE PATIENTS ABOUT THE TYPES OF LENSES AND FRAMES AVAILABLE
RANK:___
Y: P O S
N: NR RNT

E - 4
WHEN DEALING WITH A PATIENT'S QUESTION UNDERSTAND THE LEGALITY OF YOUR STATEMENTS
RANK:___
Y: P O S
N: NR RNT

E - 5
GIVE PATIENTS INFORMATION ABOUT REFERRALS TO OTHER HEALTH CARE OFFICES AND/OR HOSPITALS
RANK:___
Y: P O S
N: NR RNT

E - 6
EXPLAIN THE IMPORTANCE OF A REGULAR EYE EXAMINATION
RANK:___
Y: P O S
N: NR RNT

E - 7
EDUCATE PATIENTS IN THE CARE OF OPHTHALMIC APPLIANCES
RANK:___
Y: P O S
N: NR RNT

E - 8
GIVE PATIENTS INSTRUCTIONS REGARDING LOW VISION AIDS
RANK:___
Y: P O S
N: NR RNT

E - 9
EDUCATE THE PATIENTS ON THE MERITS OF HAVING A SPARE PAIR OF EYE GLASSES
RANK:___
Y: P O S
N: NR RNT

F - 3
KNOW THE MATERIALS FROM WHICH LENSES ARE MADE
RANK:___
Y: P O S
N: NR RNT

F - 4
BE ABLE TO ANALYZE LENSES USING A LENSMETER AND A LENS CLOCK
RANK:___
Y: P O S
N: NR RNT

F - 5
UNDERSTAND THE FUNCTION OF PARTS OF A LENS, E.G. SPHERE, CYLINDER, PRISM
RANK:___
Y: P O S
N: NR RNT

F - 6
KNOW THE TYPES OF SINGLE AND MULTIVISION LENSES
RANK:___
Y: P O S
N: NR RNT

F - 7
KNOW THE AVAILABILITY OF LENSES
RANK:___
Y: P O S
N: NR RNT

F - 8
KNOW HOW THE WARRANTY APPLIES TO LENSES E.G. HARDEX
RANK:___
Y: P O S
N: NR RNT

F - 9
KNOW LENS FINISHES E.G. TINTS, COATINGS ETC.
RANK:___
Y: P O S
N: NR RNT

G - 3
UNDERSTAND THE COSMETICS OF FRAME SELECTION
RANK:___
Y: P O S
N: NR RNT

G - 4
KNOW THE MATERIALS AND CONSTRUCTION OF A THE FRAME
RANK:___
Y: P O S
N: NR RNT

G - 5
KNOW THE MANUFACTURERS OF THE FRAMES
RANK:___
Y: P O S
N: NR RNT

G - 6
KNOW THE AVAILABILITY OF THE FRAMES
RANK:___
Y: P O S
N: NR RNT

G - 7
KNOW THE COURIER SERVICES AVAILABLE FROM THE LABS
RANK:___
Y: P O S
N: NR RNT

G - 8
BE ABLE TO READ THE FRAME MANUFACTURER'S CATALOGUE IN ORDER TO SELECT THE PROPER SIZE, COLOUR ETC. OF FRAME
RANK:___
Y: P O S
N: NR RNT

G - 9
KNOW HOW TO TAKE A
PATIENT'S PUPILLAR
DISTANCE AND BE AB
TO CALCULATE THEI
NEAR P.D.
RANK:___
Y: P O S
N: NR RNT

2 OF/DE

SKILL F **Lens Selection** **RANK____**	F - 1 KNOW HOW TO READ AND UNDERSTAND THE MEANING OF A PRESCRIPTION FROM A PATIENT'S CHART RANK: ____ Y: P O S N: NR RNT	F - 2 KNOW HOW LENSES ARE MANUFACTURED AND THE TIME REQUIRED FOR EACH STAGE OF DEVELOPMENT RANK: ____ Y: P O S N: NR RNT	F - 3 KNOW THE MATERIALS FROM WHICH LENSES ARE MADE RANK: ____ Y: P O S N: NR RNT	F - 4 BE ABLE TO ANALYZE LENSES USING A LENSMETER AND A LENS CLOCK RANK: ____ Y: P O S N: NR RNT	F - 5 UNDERSTAND THE FUNCTION OF PARTS OF A LENS, E.G. SPHERE, CYLINDER, PRISM RANK: ____ Y: P O S N: NR RNT	F - 6 KNOW THE TYPES OF SINGLE AND MULTIVISION LENSES RANK: ____ Y: P O S N: NR RNT	F - 7 KNOW THE AVAILABILITY OF LENSES RANK: ____ Y: P O S N: NR RNT	F - 8 KNOW HOW THE WARRANTY APPLIES TO LENSES E.G. HARDEX RANK: ____ Y: P O S N: NR RNT	F KNO E.G ETC RA Y: N:
SKILL G **Frame Selection** **RANK____**	G - 1 UNDERSTAND WHAT LENSES WILL WORK IN CERTAIN TYPES OF FRAMES RANK: ____ Y: P O S N: NR RNT	G - 2 DETERMINE THE SIZE OF FRAME FOR THE PATIENT E.G. BRIDGE, EYE SIZE, TEMPLE LENGTH RANK: ____ Y: P O S N: NR RNT	G - 3 UNDERSTAND THE COSMETICS OF FRAME SELECTION RANK: ____ Y: P O S N: NR RNT	G - 4 KNOW THE MATERIALS AND CONSTRUCTION OF A THE FRAME RANK: ____ Y: P O S N: NR RNT	G - 5 KNOW THE MANUFACTURERS OF THE FRAMES RANK: ____ Y: P O S N: NR RNT	G - 6 KNOW THE AVAILABILITY OF THE FRAMES RANK: ____ Y: P O S N: NR RNT	G - 7 KNOW THE COURIER SERVICES AVAILABLE FROM THE LABS RANK: ____ Y: P O S N: NR RNT	G - 8 BE ABLE TO READ THE FRAME MANUFACTURER'S CATALOGUE IN ORDER TO SELECT THE PROPER SIZE, COLOUR ETC. OF FRAME RANK: ____ Y: P O S N: NR RNT	G KNO PAT DIS TO NEA RA Y N
SKILL H **Ordering Rx from Labs** **RANK____**	H - 1 KNOW HOW TO READ THE PRESCRIPTION, LENS AND FRAME SELECTION ON A PATIENT'S CHART RANK: ____ Y: P O S N: NR RNT	H - 2 KNOW HOW TO ORDER USING LAB FORMS RANK: ____ Y: P O S N: NR RNT	H - 3 KNOW WHICH LAB/MANUFACTURER TO ORDER FROM IN ORDER TO GET THE DESIRED PRODUCTS RANK: ____ Y: P O S N: NR RNT	H - 4 KNOW HOW LONG IT TAKES TO GET AN ORDER FROM THE LABS/MANUFACTURERS RANK: ____ Y: P O S N: NR RNT					
SKILL I **Frame Fitting (Dispensing)** **RANK____**	I - 1 VERIFY THAT THE PRESCRIPTIONS ORDERED FROM THE LAB HAS BEEN FABRICATED CORRECTLY RANK: ____ Y: P O S N: NR RNT	I - 2 DISPENSE THE FRAME TO THE PATIENT RANK: ____ Y: P O S N: NR RNT	I - 3 ADVISE THE PATIENT ON ADAPTATION TO NEW LENSES RANK: ____ Y: P O S N: NR RNT	I - 4 INSTRUCT THE PATIENT ON THE USE AND CARE OF NEW PRESCRIPTION RANK: ____ Y: P O S N: NR RNT	I - 5 OFFER REASSURANCE AND POSITIVE RE-INFORCEMENT TO THE PATIENT WHEN NECESSARY RANK: ____ Y: P O S N: NR RNT	I - 6 GIVE PATIENTS ADVICE REGARDING FOLLOW-UP CARE WHEN NECESSARY RANK: ____ Y: P O S N: NR RNT			
SKILL J **Repairing & Adjustments** **RANK____**	J - 1 HAVE KNOWLEDGE OF FRAME NAMES AND FRAME PARTS RANK: ____ Y: P O S N: NR RNT	J - 2 KNOW WHEN NOT TO ADJUST A FRAME RANK: ____ Y: P O S N: NR RNT	J - 3 BE ABLE TO IMPROVISE WITH TEMPORARY REPAIRS RANK: ____ Y: P O S N: NR RNT	J - 4 KNOW THE PRODUCT AVAILABILITY RANK: ____ Y: P O S N: NR RNT	J - 5 KNOW WHEN TO ADVISE PATIENTS THAT THEY ARE DUE FOR AN EYE EXAM RATHER THAN REPAIR AN EXISTING OUT-DATED PRESCRIPTION IN AN OLD FRAME RANK: ____ Y: P O S N: NR RNT	J - 6 KNOW WHO TO CUSTOMIZE FRAMES WHEN POSSIBLE RANK: ____ Y: P O S N: NR RNT			
SKILL K **Purchasing** **RANK____**	K - 1 BE FAMILIAR WITH VARIOUS DISCOUNT SYSTEMS E.G. BULK PURCHASING AND DISCOUNTS ON LAB BILLS RANK: ____ Y: P O S N: NR RNT	K - 2 BE FAMILIAR WITH RETURN POLICY AND GUARANTEES ON FRAMES RANK: ____ Y: P O S N: NR RNT	K - 3 KNOW THE WARRANTY ON LENSES RANK: ____ Y: P O S N: NR RNT	K - 4 KNOW THE LABORATORY WARRANTY ON CONTACT LENSES RANK: ____ Y: P O S N: NR RNT	K - 5 KNOW THE LABORATORY RETURN POLICY ON CONTACT LENSES RANK: ____ Y: P O S N: NR RNT	K - 6 KNOW THE SUPPLIER'S RETURN POLICY ON CONTACT LENS SOLUTIONS RANK: ____ Y: P O S N: NR RNT			
SKILL L **Order Contact Lenses from Labs** **RANK____**	L - 1 KNOW AND UNDERSTAND WHAT YOU ARE READING WHEN YOU READ THE PRESCRIPTION FROM A PATIENT'S CONTACT LENS RANK: ____ Y: P O S N: NR RNT	L - 2 KNOW WHICH LAB TO ORDER A SPECIFIC WHICH TYPE OF CONTACT LENS RANK: ____ Y: P O S N: NR RNT	L - 3 KNOW YOUR OFFICE'S FEE STRUCTURE REGARDING NEW CONTACT LENS PATIENTS RANK: ____ Y: P O S N: NR RNT	L - 4 KNOW YOUR OFFICE'S FEE STRUCTURE REGARDING PATIENT'S CONTACT LENS REPLACMENT RANK: ____ Y: P O S N: NR RNT					
SKILL M **Contact Lens Dispensing** **RANK____**			M - 3 BE ABLE TO PERFORM CORRECTLY THE INSERTION AND REMOVAL TECHNIQUES FOR CONTACT LENSES RANK: ____ Y: P O S N: NR RNT	M - 4 KNOW CONTACT LENS MAINTENANCE RANK: ____ Y: P O S N: NR RNT	M - 5 KNOW WHICH SOLUTIONS TO USE IN THE CARE OF CONTACT LENSES RANK: ____ Y: P O S N: NR RNT	M - 6 MAKE CERTAIN THAT THE PATIENT UNDERSTANDS THE WEARING SCHEDULE RANK: ____ Y: P O S N: NR RNT	M - 7 MAKE CERTAIN THAT THE PATIENTS UNDERSTAND THE IMPORTANCE OF FOLLOW-UP CARE AND RECHECKS RANK: ____ Y: P O S N: NR RNT	M - 8 WHEN IT APPLIES, ADVISE PATIENTS ABOUT CONTACT LENS WARRANTIES RANK: ____ Y: P O S N: NR RNT	B M M

3 OF/DE

N: NR RNT

Y: P O S
N: NR RNT

Y: P O S
N: NR RNT

Y: P O S
N: NR RNT

N: NR RNT

N: NR RNT

Y: P O S
N: NR RNT

F - 3
KNOW THE MATERIALS FROM WHICH LENSES ARE MADE
RANK:___
Y: P O S
N: NR RNT

F - 4
BE ABLE TO ANALYZE LENSES USING A LENSMETER AND A LENS CLOCK
RANK:___
Y: P O S
N: NR RNT

F - 5
UNDERSTAND THE FUNCTION OF PARTS OF A LENS, E.G. SPHERE, CYLINDER, PRISM
RANK:___
Y: P O S
N: NR RNT

F - 6
KNOW THE TYPES OF SINGLE AND MULTIVISION LENSES
RANK:___
Y: P O S
N: NR RNT

F - 7
KNOW THE AVAILABILITY OF LENSES
RANK:___
Y: P O S
N: NR RNT

F - 8
KNOW HOW THE WARRANTY APPLIES TO LENSES E.G. HARDEX
RANK:___
Y: P O S
N: NR RNT

F - 9
KNOW LENS FINISHES E.G. TINTS, COATINGS ETC.
RANK:___
Y: P O S
N: NR RNT

G - 3
UNDERSTAND THE COSMETICS OF FRAME SELECTION
RANK:___
Y: P O S
N: NR RNT

G - 4
KNOW THE MATERIALS AND CONSTRUCTION OF A THE FRAME
RANK:___
Y: P O S
N: NR RNT

G - 5
KNOW THE MANUFACTURERS OF THE FRAMES
RANK:___
Y: P O S
N: NR RNT

G - 6
KNOW THE AVAILABILITY OF THE FRAMES
RANK:___
Y: P O S
N: NR RNT

G - 7
KNOW THE COURIER SERVICES AVAILABLE FROM THE LABS
RANK:___
Y: P O S
N: NR RNT

G - 8
BE ABLE TO READ THE FRAME MANUFACTURER'S CATALOGUE IN ORDER TO SELECT THE PROPER SIZE, COLOUR ETC. OF FRAME
RANK:___
Y: P O S
N: NR RNT

G - 9
KNOW HOW TO TAKE A PATIENT'S PUPILLARY DISTANCE AND BE ABLE TO CALCULATE THEIR NEAR P.D.
RANK:___
Y: P O S
N: NR RNT

G - 10
BE ABLE TO MEASURE A PATIENT'S BIFOCAL HEIGHT.
RANK:___
Y: P O S
N: NR RNT

G - 11
KNOW THE FRAME AND LENS FEE STRUCTURE FOR YOUR OFFICE
RANK:___
Y: P O S
N: NR RNT

H - 3
KNOW WHICH LAB/MANUFACTURER TO ORDER FROM IN ORDER TO GET THE DESIRED PRODUCTS
RANK:___
Y: P O S
N: NR RNT

H - 4
KNOW HOW LONG IT TAKES TO GET AN ORDER FROM THE LABS/MANUFACTURERS
RANK:___
Y: P O S
N: NR RNT

I - 3
ADVISE THE PATIENT ON ADAPTATION TO NEW LENSES
RANK:___
Y: P O S
N: NR RNT

I - 4
INSTRUCT THE PATIENT ON THE USE AND CARE OF NEW PRESCRIPTION
RANK:___
Y: P O S
N: NR RNT

I - 5
OFFER REASSURANCE AND POSITIVE RE-INFORCEMENT TO THE PATIENT WHEN NECESSARY
RANK:___
Y: P O S
N: NR RNT

I - 6
GIVE PATIENTS ADVICE REGARDING FOLLOW-UP CARE WHEN NECESSARY
RANK:___
Y: P O S
N: NR RNT

J - 3
BE ABLE TO IMPROVISE WITH TEMPORARY REPAIRS
RANK:___
Y: P O S
N: NR RNT

J - 4
KNOW THE PRODUCT AVAILABILITY
RANK:___
Y: P O S
N: NR RNT

J - 5
KNOW WHEN TO ADVISE PATIENTS THAT THEY ARE DUE FOR AN EYE EXAM RATHER THAN REPAIR AN EXISTING OUT-DATED PRESCRIPTION IN AN OLD FRAME
RANK:___
Y: P O S
N: NR RNT

J - 6
KNOW WHO TO CUSTOMIZE FRAMES WHEN POSSIBLE
RANK:___
Y: P O S
N: NR RNT

K - 3
KNOW THE WARRANTY ON LENSES
RANK:___
Y: P O S
N: NR RNT

K - 4
KNOW THE LABORATORY WARRANTY ON CONTACT LENSES
RANK:___
Y: P O S
N: NR RNT

K - 5
KNOW THE LABORATORY RETURN POLICY ON CONTACT LENSES
RANK:___
Y: P O S
N: NR RNT

K - 6
KNOW THE SUPPLIER'S RETURN POLICY ON CONTACT LENS SOLUTIONS
RANK:___
Y: P O S
N: NR RNT

L - 3
KNOW YOUR OFFICE'S FEE STRUCTURE REGARDING NEW CONTACT LENS PATIENTS
RANK:___
Y: P O S
N: NR RNT

L - 4
KNOW YOUR OFFICE'S FEE STRUCTURE REGARDING PATIENT'S CONTACT LENS REPLACMENT
RANK:___
Y: P O S
N: NR RNT

M - 3
BE ABLE TO PERFORM CORRECTLY THE INSERTION AND REMOVAL TECHNIQUES FOR CONTACT LENSES
RANK:___
Y: P O S
N: NR RNT

M - 4
KNOW CONTACT LENS MAINTENANCE
RANK:___
Y: P O S
N: NR RNT

M - 5
KNOW WHICH SOLUTIONS TO USE IN THE CARE OF CONTACT LENSES
RANK:___
Y: P O S
N: NR RNT

M - 6
MAKE CERTAIN THAT THE PATIENT UNDERSTANDS THE WEARING SCHEDULE
RANK:___
Y: P O S
N: NR RNT

M - 7
MAKE CERTAIN THAT THE PATIENTS UNDERSTAND THE IMPORTANCE OF FOLLOW-UP CARE AND RECHECKS
RANK:___
Y: P O S
N: NR RNT

M - 8
WHEN IT APPLIES, ADVISE PATIENTS ABOUT CONTACT LENS WARRANTIES
RANK:___
Y: P O S
N: NR RNT

M - 9
BE ABLE TO MAKE MINOR ADJUSTMENTS TO HARD CONTACT LENSE
RANK:___
Y: P O S
N: NR RNT

4

OF/DE

SKILL J **Repairing & Adjustments** **RANK____**	J - 1 HAVE KNOWLEDGE OF FRAME NAMES AND FRAME PARTS RANK:___ Y: P O S N: NR RNT	J - 2 KNOW WHEN NOT TO ADJUST A FRAME RANK:___ Y: P O S N: NR RNT	J - 3 BE ABLE TO IMPROVISE WITH TEMPORARY REPAIRS RANK:___ Y: P O S N: NR RNT	J - 4 KNOW THE PRODUCT AVAILABILITY RANK:___ Y: P O S N: NR RNT	J - 5 KNOW WHEN TO ADVISE PATIENTS THAT THEY ARE DUE FOR AN EYE EXAM RATHER THAN REPAIR AN EXISTING OUT-DATED PRESCRIPTION IN AN OLD FRAME RANK:___ Y: P O S N: NR RNT	J - 6 KNOW WHO TO CUSTOMIZE FRAMES WHEN POSSIBLE RANK:___ Y: P O S N: NR RNT			
SKILL K **Purchasing** **RANK____**	K - 1 BE FAMILIAR WITH VARIOUS DISCOUNT SYSTEMS E.G. BULK PURCHASING AND DISCOUNTS ON LAB BILLS RANK:___ Y: P O S N: NR RNT	K - 2 BE FAMILIAR WITH RETURN POLICY AND GUARANTEES ON FRAMES RANK:___ Y: P O S N: NR RNT	K - 3 KNOW THE WARRANTY ON LENSES RANK:___ Y: P O S N: NR RNT	K - 4 KNOW THE LABORATORY WARRANTY ON CONTACT LENSES RANK:___ Y: P O S N: NR RNT	K - 5 KNOW THE LABORATORY RETURN POLICY ON CONTACT LENSES RANK:___ Y: P O S N: NR RNT	K - 6 KNOW THE SUPPLIER'S RETURN POLICY ON CONTACT LENS SOLUTIONS RANK:___ Y: P O S N: NR RNT			
SKILL L **Order Contact Lenses from Labs** **RANK____**	L - 1 KNOW AND UNDERSTAND WHAT YOU ARE READING WHEN YOU READ THE PRESCRIPTION FROM A PATIENT'S CONTACT LENS RANK:___ Y: P O S N: NR RNT	L - 2 KNOW WHICH LAB TO ORDER A SPECIFIC WHICH TYPE OF CONTACT LENS RANK:___ Y: P O S N: NR RNT	L - 3 KNOW YOUR OFFICE'S FEE STRUCTURE REGARDING NEW CONTACT LENS PATIENTS RANK:___ Y: P O S N: NR RNT	L - 4 KNOW YOUR OFFICE'S FEE STRUCTURE REGARDING PATIENT'S CONTACT LENS REPLACMENT RANK:___ Y: P O S N: NR RNT					
SKILL M **Contact Lens Dispensing** **RANK____**	M - 1 VERIFY THAT THE CONTACT LENS PRESCRIPTION FROM THE LAB IS CORRECT RANK:___ Y: P O S N: NR RNT	M - 2 DEAL WITH PATIENTS CONCERNS REGARDING THE MISINFORMATION THEY MAY HAVE ABOUT CONTACT LENSES RANK:___ Y: P O S N: NR RNT	M - 3 BE ABLE TO PERFORM CORRECTLY THE INSERTION AND REMOVAL TECHNIQUES FOR CONTACT LENSES RANK:___ Y: P O S N: NR RNT	M - 4 KNOW CONTACT LENS MAINTENANCE RANK:___ Y: P O S N: NR RNT	M - 5 KNOW WHICH SOLUTIONS TO USE IN THE CARE OF CONTACT LENSES RANK:___ Y: P O S N: NR RNT	M - 6 MAKE CERTAIN THAT THE PATIENT UNDERSTANDS THE WEARING SCHEDULE RANK:___ Y: P O S N: NR RNT	M - 7 MAKE CERTAIN THAT THE PATIENTS UNDERSTAND THE IMPORTANCE OF FOLLOW-UP CARE AND RECHECKS RANK:___ Y: P O S N: NR RNT	M - 8 WHEN IT APPLIES, ADVISE PATIENTS ABOUT CONTACT LENS WARRANTIES RANK:___ Y: P O S N: NR RNT	M - 9 BE ABL MINOR HARD C RANK: Y: P N: NR
SKILL N **Visual Training** **RANK____**	N - 1 UNDERSTANDING BASIC TERMINOLOGY RANK:___ Y: P O S N: NR RNT	N - 2 ADMINISTER HEALTH HISTORY QUESTIONNAIRE RANK:___ Y: P O S N: NR RNT	N - 3 UNDERSTAND BASIC VISUAL TRAINING EQUIPMENT RANK:___ Y: P O S N: NR RNT	N - 4 UNDERSTAND VISUAL TRAINING TECHNIQUES RANK:___ Y: P O S N: NR RNT	N - 5 KNOW HOW TO USE VISUAL TRAINING EQUIPMENT RANK:___ Y: P O S N: NR RNT	N - 6 MOTIVATE THE PATIENT TO MAINTAIN VISUAL TRAINING THERAPY RANK:___ Y: P O S N: NR RNT	N - 7 MAINTAIN PATIENT'S VISUAL TRAINING PROGRESS CHARTS FOR THE DOCTOR RANK:___ Y: P O S N: NR RNT		
SKILL O **Preliminary Screening** **RANK____**	O - 1 UNDERSAND WHY YOU PRE-TEST RANK:___ Y: P O S N: NR RNT	O - 2 FILING OUT PATIENT'S CARDS RE: HISTORY RANK:___ Y: P O S N: NR RNT	O - 3 CHECK UNCORRECTED OR UNAIDED VISUAL ACUITY RANK:___ Y: P O S N: NR RNT	O - 4 BE ABLE TO USE A TONOMETER RANK:___ Y: P O S N: NR RNT	O - 5 CHECK PATIENT FOR COLOUR VISION DEFECTS RANK:___ Y: P O S N: NR RNT	O - 6 PERFORM FIELD TESTING RANK:___ Y: P O S N: NR RNT	O - 7 CHECK FOR BINOCULAR VISION RANK:___ Y: P O S N: NR RNT	O - 8 TAKE BLOOD PRESSURE READINGS RANK:___ Y: P O S N: NR RNT	
SKILL P **Cost Analysis for Materials** **RANK____**	P - 1 COST FOR LENSES RANK:___ Y: P O S N: NR RNT	P - 2 COST FOR FRAMES RANK:___ Y: P O S N: NR RNT	P - 3 BE AWARE OF THE CURRENT MARKET FEES WITHIN THE INDUSTRY RANK:___ Y: P O S N: NR RNT	P - 4 KNOW YOUR OFFICE'S DISPENSING FEES RANK:___ Y: P O S N: NR RNT	P - 5 UNDERSTAND YOUR OFFICE'S REFERRAL FEES RANK:___ Y: P O S N: NR RNT				
SKILL Q **Financial Statements** **RANK**	Q - 1 ANALYZE FINANCIAL STATEMENTS IN ORDER TO MAKE OFFICE PROJECTION DECISIONS RANK:___ Y: P O S N: NR RNT	Q - 2 BE ABLE TO DO COST ACCOUNTING, E.G. COST-VOLUMNE-PROFIT ANALYSIS RANK:___ Y: P O S N: NR RNT	Q - 3 UNDERSTAND TAX CONSIDERATIONS IN BUSINESS DECISIONS RANK:___ Y: P O S N: NR RNT						
SKILL R **Math** **RANK____**	R - 1 PERFORM BASIC MATHEMATICAL OPERATIONS RANK:___ Y: O P S N: NR RNT	R - 2 UNDERSTAND BASIC PRINCIPLES OF ALGEBRA RANK:___ Y: P O S N: NR RNT	R - 3 COMPUTE WITH DOLLARS AND CENTS RANK:___ Y: P O S N: NR RNT	R - 4 CALCULATE WEIGHTS AND MEASURE RANK:___ Y: P O S N: NR RNT					

LEGEND:

Y: Yes, I perform this task.
P: I learned this task prior to entering the job.
O: I learned this task on-the-job.
S: I learned this task at an ad hoc course.
N: No, I do not perform this task.
NR: I do not perform this task because it is not relevent to my job.
RNT: I do not perform this task because I need further training in the area.

Form Ex 314-77

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J - 3
BE ABLE TO IMPROVISE WITH TEMPORARY REPAIRS
RANK:
Y: P O S
N: NR RNT

J - 4
KNOW THE PRODUCT AVAILABILITY
RANK:___
Y: P O S
N: NR RNT

J - 5
KNOW WHEN TO ADVISE PATIENTS THAT THEY ARE DUE FOR AN EYE EXAM RATHER THAN REPAIR AN EXISTING OUT-DATED PRESCRIPTION IN AN OLD FRAME
RANK:___
Y: P O S
N: NR RNT

J - 6
KNOW WHO TO CUSTOMIZE FRAMES WHEN POSSIBLE
RANK:___
Y: P O S
N: NR RNT

K - 3
KNOW THE WARRANTY ON LENSES
RANK:
Y: P O S
N: NR RNT

K - 4
KNOW THE LABORATORY WARRANTY ON CONTACT LENSES
RANK:
Y: P O S
N: NR RNT

K - 5
KNOW THE LABORATORY RETURN POLICY ON CONTACT LENSES
RANK:
Y: P O S
N: NR RNT

K - 6
KNOW THE SUPPLIER'S RETURN POLICY ON CONTACT LENS SOLUTIONS
RANK:
Y: P O S
N: NR RNT

L - 3
KNOW YOUR OFFICE'S FEE STRUCTURE REGARDING NEW CONTACT LENS PATIENTS
RANK:
Y: P O S
N: NR RNT

L - 4
KNOW YOUR OFFICE'S FEE STRUCTURE REGARDING PATIENT'S CONTACT LENS REPLACMENT
RANK:
Y: P O S
N: NR RNT

M - 3
BE ABLE TO PERFORM CORRECTLY THE INSERTION AND REMOVAL TECHNIQUES FOR CONTACT LENSES
RANK:
Y: P O S
N: NR RNT

M - 4
KNOW CONTACT LENS MAINTENANCE
RANK:___
Y: P O S
N: NR RNT

M - 5
KNOW WHICH SOLUTIONS TO USE IN THE CARE OF CONTACT LENSES
RANK:___
Y: P O S
N: NR RNT

M - 6
MAKE CERTAIN THAT THE PATIENT UNDERSTANDS THE WEARING SCHEDULE
RANK:___
Y: P O S
N: NR RNT

M - 7
MAKE CERTAIN THAT THE PATIENTS UNDERSTAND THE IMPORTANCE OF FOLLOW-UP CARE AND RECHECKS
RANK:___
Y: P O S
N: NR RNT

M - 8
WHEN IT APPLIES, ADVISE PATIENTS ABOUT CONTACT LENS WARRANTIES
RANK:___
Y: P O S
N: NR RNT

M - 9
BE ABLE TO MAKE MINOR ADJUSTMENTS TO HARD CONTACT LENSE
RANK:___
Y: P O S
N: NR RNT

N - 3
UNDERSTAND BASIC VISUAL TRAINING EQUIPMENT
RANK:___
Y: P O S
N: NR RNT

N - 4
UNDERSTAND VISUAL TRAINING TECHNIQUES
RANK:___
Y: P O S
N: NR RNT

N - 5
KNOW HOW TO USE VISUAL TRAINING EQUIPMENT
RANK:___
Y: P O S
N: NR RNT

N - 6
MOTIVATE THE PATIENT TO MAINTAIN VISUAL TRAINING THERAPY
RANK:___
Y: P O S
N: NR RNT

N - 7
MAINTAIN PATIENT'S VISUAL TRAINING PROGRESS CHARTS FOR THE DOCTOR
RANK:___
Y: P O S
N: NR RNT

O - 3
CHECK UNCORRECTED OR UNAIDED VISUAL ACUITY
RANK:___
Y: P O S
N: NR RNT

O - 4
BE ABLE TO USE A TONOMETER
RANK:___
Y: P O S
N: NR RNT

O - 5
CHECK PATIENT FOR COLOUR VISION DEFECTS
RANK:___
Y: P O S
N: NR RNT

O - 6
PERFORM FIELD TESTING
RANK:___
Y: P O S
N: NR RNT

O - 7
CHECK FOR BINOCULAR VISION
RANK:___
Y: P O S
N: NR RNT

O - 8
TAKE BLOOD PRESSURE READINGS
RANK:___
Y: P O S
N: NR RNT

P - 3
BE AWARE OF THE CURRENT MARKET FEES WITHIN THE INDUSTRY
RANK:___
Y: P O S
N: NR RNT

P - 4
KNOW YOUR OFFICE'S DISPENSING FEES
RANK:___
Y: P O S
N: NR RNT

P - 5
UNDERSTAND YOUR OFFICE'S REFERRAL FEES
RANK:___
Y: P O S
N: NR RNT

Q - 3
UNDERSTAND TAX CONSIDERATIONS IN BUSINESS DECISIONS
RANK:
Y: P O S
N: NR RNT

R - 3
COMPUTE WITH DOLLARS AND CENTS
RANK:
Y: P O S
N: NR RNT

R - 4
CALCULATE WEIGHTS AND MEASURE
RANK:
Y: P O S
N: NR RNT

LEGEND:

Y: Yes, I perform this task.
P: I learned this task prior to entering the job.
O: I learned this task on-the-job.
S: I learned this task at an ad hoc course.
N: No, I do not perform this task.
NR: I do not perform this task because it is not relevant to my job.
RNT: I do not perform this task because I need further training in the area.

NAME:____________________

OFFICE:____________________

OCCUPATION:____________________

RETURN TO:
MARLOWE LINDBERG
7416 - 182nd Street
Edmonton, Alberta
T5T - 2G7

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CHART 3

PROFILE of OCCUPATIONAL SKILLS and TASKS for an OPTOMETRIC RECEPTIONIST

SKILL A INTERPERSONAL SKILLS	A - 1 RECEIVE PATIENTS AND OFFICE VISITORS	A - 2 MAINTAIN EFFECTIVE WORKING RELATIONSHIPS, BE PART OF A TEAM	A - 3 CREATE A FRIENDLY AND COMFORTABLE ATMOSPHERE	A - 4 DEVELOP SENSITIVITY TO THE NEEDS OF THE PATIENTS	A - 5 WORK INDEPENDENTLY	A - 6 ACT IN A DIPLOMATIC MANNER	A - 7 ACQUIRE A SENSE OF HUMOUR	A - 8 ADAPT TO AND DEAL WITH STRESS	A - IDEN WHICH	
SKILL B DEPENDABILITY	B-1 PROJECT A PROFESSIONAL APPEARANCE	B-2 ADHERE TO WORK TIME SCHEDULE	B-3 KEEP PATIENTS' CONFIDENTIALITY	B-4 ORGANIZE YOUR WORK PRIORITIES	B-5 DEVELOP GOOD LISTENING HABITS					
SKILL C TELEPHONE TECHNIQUES	C-1 USE ACCEPTABLE TELEPHONE MANNERS	C-2 DETERMINE IF YOU CAN ASSIST THIS CALLER	C-3 BE PERCEPTIVE WHEN SCREENING TELEPHONE, E.G. KNOW IF IT IS AN EMERGENCY	C-4 ANSWER THE TELEPHONE PROMPTLY	C-5 IDENTIFY CALLER IN ORDER TO SCREEN TELEPHONE CALLS	C-6 LISTEN CAREFULLY, TAKE NOTES AND DO NOT MAKE THE CALLER REPEAT THE INFORMATION	C-7 KNOW HOW TO HANDLE TELEPHONE APPOINTMENT CANCELLATIONS	C-8 KNOW HOW TO DEAL WITH TELEPHONE SHOPPERS	C-9 KNO TEL	
SKILL D APPOINTMENT MANAGEMENT	D-1 DETERMINE THE PATIENT'S NEEDS WHEN THEY ARE MAKING APPOINTMENTS	D-2 KNOW THE TIME REQUIRED FOR THE PATIENT'S APPOINTMENTS	D-3 ALWAYS OBTAIN THE PATIENT'S NAME AND TELEPHONE NUMBER	D-4 FIND OUT IF THE PATIENTS IS A NEW, REFERRED OR RE-CHECK	D-5 KNOW HOW TO RE-ARRANGE THE APPOINTMENT BOOK IN AN EMERGENCY	D-6 TELEPHONE PATIENTS TO CONFIRM APPOINTMENTS FOR THE NEXT DAY	D-7 ESTABLISH A WAITING LIST FOR PATIENTS WHO CAN BE FITTED INTO CANCELLED APPOINTMENTS			
SKILL E TERMINOLOGY	E-1 DEFINE THE OPTOMETRIC SERVICES THAT YOUR OFFICE PROVIDES	E-2 EXPLAIN THE FEE STRUCTURE FOR YOUR OFFICE	E-3 DISTINGUISH DIFFERENCES RE: AN OPTOMETRIST, OPHTHALMOLOGIST AND AN OPTICIAN	E-4 KNOW THE NAMES FOR THE PARTS OF A FRAME	E-5 KNOW THE DIFFERENT TYPES OF EYE GLASS LENSES	E-6 KNOW THE DIFFERENT TYPES OF CONTACT LENSES	E-7 KNOW THE DIFFERENT TYPES OF CONTACT LENS SOLUTIONS	E-8 DEVELOP A VOCABULARY OF TERMS RELATING TO THE ANATOMY OF THE EYE	E-9 MAI OPT	
SKILL F RECORD MANAGEMENT	F-1 PREPARE CHARTS FOR NEW PATIENTS, REGULAR EYE EXAMS, CONTACT LENSES AND/OR VISUAL TRAINING	F-2 SET UP AN APPROPRIATE FILING SYSTEM FOR YOUR OFFICE	F-3 KNOW HOW TO CORRECTLY FILE AND RETRIEVE FILES FROM YOUR SYSTEM	F-4 KNOW HOW TO FIND A LOST FILE WITHIN YOUR SYSTEM	F-5 PREPARE DOCTOR'S DAY SHEET	F-6 MAINTAIN AN UP-TO-DATE FILING SYSTEM BY PURGING YOUR FILES ON A REGULAR BASIS	F-7 UNDERSTAND AND COMPARE DIFFERENT FILING SYSTEMS			
SKILL G ACCOUNTING	G-1 KNOW HOW TO COLLECT FEES	G-2 KNOW HOW TO COLLECT BAD DEBTS	G-3 RECORD YOUR OFFICES ACCOUNTS RECEIVABLE	G-4 UNDERSTAND HOW TO FILL OUT 3RD PARTY PAYMENTS, SUCH AS: A.H.C., SOCIAL ASSISTANCE ETC.	G-5 PROCESS YOUR OFFICE'S BANKING PROCEDURES	G-6 RECORD AND PAY YOUR OFFICE'S ACCOUNTS PAYABLE	G-7 KNOW WHAT YOUR CASH FLOAT IS AND KNOW HOW TO KEEP IT BALANCED	G-8 RECORD AND BALANCE YOUR PETTY CASH	G-9 POST TO YOUR GENERAL LEDGER AND KEEP IT BALANCED	G-10 PREP
SKILL H GENERAL OFFICE PROCEDURES	H -1 PROCESS AND DEAL WITH GOODS RECEIVED FROM COURIER SERVICE (LAB. DELIVERIES)	H-2 PROCESS INCOMING MAIL	H-3 KNOW WHICH IS THE BEST COURIER SERVICES FOR YOUR OFFICE	H-4 KNOW THE MAILING PROCEDURES USED BY YOUR OFFICE, FOR EXAMPLE: C.O.D., PARCEL POST, REGISTERED MAIL						
SKILL I TYPING	I-1 TYPE THE ALBERTA HEALTH CARE FORMS	I-2 TYPE STATEMENTS (ACCOUNTS PAYABLE)	I-3 TYPE RECALL CARDS	I-4 TYPE REFERAL LETTERS TO OTHER PRACTITIONERS	I-5 TYPE MEMOS					
SKILL J WRITING COMPETENCIES	J-1 COMPOSE A SIMPLE BUSINESS LETTER	J-2 USE PROPER GRAMMAR	J-3 USE PROPER SPELLING	J-4 USE PROPER PUNCTUATION	J-5 UNDERSTAND WHAT YOU HAVE WRITTEN	J-6 PROOFREAD YOUR WORK				
SKILL K INNER OFFICE MAINTENANC	K-1 MAINTAIN A CLEAN AND TIDY WAITING ROOM	K-2 KEEP YOUR DOCTOR'S EQUIPMENT CLEAN	K-3 KEEP YOUR OFFICE EQUIPMENT IN GOOD WORKING ORDER	K-4 ORDER PRINTING SUPPLIES, OFFICE STATIONARY, ETC.	K-5 ORDER TECHNICAL SUPPLIES	K-6 ORDER OFFICE SUPPLIES, E.G., SOAP, TOWELS, MAGAZINES, COFFEE	K-7 WATER THE PLANTS REGULARLY	K-8 KNOW HOW TO MAKE COFFEE		
SKILL L ORDERING CO LENSES		IDENTIFY THE NTACT LENS FROM T'S CHARTS	L-3 KNOW THE CONTACT LENS COMPANIES REPLACEMENT POLICY AND DELIVERY DATES	L-4 KNOW HOW TO CARE FOR CONTACT LENSES	L-5 HOW TO USE CONTACT LENS SOLUTIONS	L-6 KEEP A RECORD OF ALL CONTACT LENS ORDERS	L-7 KNOW HOW TO ORDER CONTACT LENS SOLUTIONS	L-8 KEEP A RECORD OF THE DATES FOR CONTACT LENS SOLUTIONS		
SKILL M ORDER OPHTHALMIC	M-1 KNOW HOW TO READ A	M-2 IDENTIFY SPECIFICATIONS	M-3 KNOW WHICH DISTRIBUTORS	M-4 PERFORM MINOR REPAIRS TO	M-5 USE A FRAME CATALOGUE	M-6 KNOW HOW TO ORDER PARTS OF FRAMES	M-7 KNOW HOW TO KEEP A RECORD OF YOUR FRAME STOCK	M-8 KNOW HOW TO KEEP A RECORD OF ALL YOUR FRAME AND		

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OCCUPATIONAL SKILLS and
OPTOMETRIC RECEPTIONIST

EFFECTIVE RELATIONSHIPS, BE A TEAM	A - 3 CREATE A FRIENDLY AND COMFORTABLE ATMOSPHERE	A - 4 DEVELOP SENSITIVITY TO THE NEEDS OF THE PATIENTS	A - 5 WORK INDEPENDENTLY	A - 6 ACT IN A DIPLOMATIC MANNER	A - 7 ACQUIRE A SENSE OF HUMOUR	A - 8 ADAPT TO AND DEAL WITH STRESS	A - 9 IDENTIFY SITUATIONS UNDER WHICH YOU HAVE NO CONTROL	A - 10 KNOW WHEN TO START/STOP A CONVERSATION	A - 11 DON'T BE AFRAID TO ASK QUESTIONS	
TO WORK TIME E	B-3 KEEP PATIENTS' CONFIDENTIALITY	B-4 ORGANIZE YOUR WORK PRIORITIES	B-5 DEVELOP GOOD LISTENING HABITS							
E IF YOU CAN THIS CALLER	C-3 BE PERCEPTIVE WHEN SCREENING TELEPHONE, E.G. KNOW IF IT IS AN EMERGENCY	C-4 ANSWER THE TELEPHONE PROMPTLY	C-5 IDENTIFY CALLER IN ORDER TO SCREEN TELEPHONE CALLS	C-6 LISTEN CAREFULLY, TAKE NOTES AND DO NOT MAKE THE CALLER REPEAT THE INFORMATION	C-7 KNOW HOW TO HANDLE TELEPHONE APPOINTMENT CANCELLATIONS	C-8 KNOW HOW TO DEAL WITH TELEPHONE SHOPPERS	C-9 KNOW HOW TO USE THE TELEPHONE FOR RECALLS			
TIME REQUIRED PATIENT'S ENTS	D-3 ALWAYS OBTAIN THE PATIENT'S NAME AND TELEPHONE NUMBER	D-4 FIND OUT IF THE PATIENTS IS A NEW, REFERRED OR RE-CHECK	D-5 KNOW HOW TO RE-ARRANGE THE APPOINTMENT BOOK IN AN EMERGENCY	D-6 TELEPHONE PATIENTS TO CONFIRM APPOINTMENTS FOR THE NEXT DAY	D-7 ESTABLISH A WAITING LIST FOR PATIENTS WHO CAN BE FITTED INTO CANCELLED APPOINTMENTS					
THE FEE STRUCTURE OFFICE	E-3 DISTINGUISH DIFFERENCES RE: AN OPTOMETRIST, OPHTHALMOLOGIST AND AN OPTICIAN	E-4 KNOW THE NAMES FOR THE PARTS OF A FRAME	E-5 KNOW THE DIFFERENT TYPES OF EYE GLASS LENSES	E-6 KNOW THE DIFFERENT TYPES OF CONTACT LENSES	E-7 KNOW THE DIFFERENT TYPES OF CONTACT LENS SOLUTIONS	E-8 DEVELOP A VOCABULARY OF TERMS RELATING TO THE ANATOMY OF THE EYE	E-9 MAINTAIN A DICTIONARY OF OPTOMETRIC TERMS	E-10 KNOW THE HISTORICAL OVERVIEW FOR THE OPTOMETRIC PROFESSION		
N APPROPRIATE YSTEM FOR YOUR	F-3 KNOW HOW TO CORRECTLY FILE AND RETRIEVE FILES FROM YOUR SYSTEM	F-4 KNOW HOW TO FIND A LOST FILE WITHIN YOUR SYSTEM	F-5 PREPARE DOCTOR'S DAY SHEET	F-6 MAINTAIN AN UP-TO-DATE FILING SYSTEM BY PURGING YOUR FILES ON A REGULAR BASIS	F-7 UNDERSTAND AND COMPARE DIFFERENT FILING SYSTEMS					
TO COLLECT BAD	G-3 RECORD YOUR OFFICES ACCOUNTS RECEIVABLE	G-4 UNDERSTAND HOW TO FILL OUT 3RD PARTY PAYMENTS, SUCH AS: A.H.C., SOCIAL ASSISTANCE ETC.	G-5 PROCESS YOUR OFFICE'S BANKING PROCEDURES	G-6 RECORD AND PAY YOUR OFFICE'S ACCOUNTS PAYABLE	G-7 KNOW WHAT YOUR CASH FLOAT IS AND KNOW HOW TO KEEP IT BALANCED	G-8 RECORD AND BALANCE YOUR PETTY CASH	G-9 POST TO YOUR GENERAL LEDGER AND KEEP IT BALANCED	G-10 PREPARE A BALANCE SHEET	G-11 PROCESS YOU OFFICE'S PAYROLL, FOR EXAMPLE: UIC, INCOME TAX, C.P.P., ECT.	G-12 PREPARE AN INCOME STATEMENT
INCOMING MAIL	H-3 KNOW WHICH IS THE BEST COURIER SERVICES FOR YOUR OFFICE	H-4 KNOW THE MAILING PROCEDURES USED BY YOUR OFFICE, FOR EXAMPLE: C.O.D., PARCEL POST, REGISTERED MAIL								
ATEMENTS (ACCOUNTS	I-3 TYPE RECALL CARDS	I-4 TYPE REFERAL LETTERS TO OTHER PRACTITIONERS	I-5 TYPE MEMOS							
ER GRAMMAR	J-3 USE PROPER SPELLING	J-4 USE PROPER PUNCTUATION	J-5 UNDERSTAND WHAT YOU HAVE WRITTEN	J-6 PROOFREAD YOUR WORK						
R DOCTOR'S T CLEAN	K-3 KEEP YOUR OFFICE EQUIPMENT IN GOOD WORKING ORDER	K-4 ORDER PRINTING SUPPLIES, OFFICE STATIONARY, ETC.	K-5 ORDER TECHNICAL SUPPLIES	K-6 ORDER OFFICE SUPPLIES, E.G., SOAP, TOWELS, MAGAZINES, COFFEE	K-7 WATER THE PLANTS REGULARLY	K-8 KNOW HOW TO MAKE COFFEE				
TO IDENTIFY THE CONTACT LENS FROM ENT'S CHARTS	L-3 KNOW THE CONTACT LENS COMPANIES REPLACEMENT POLICY AND DELIVERY DATES	L-4 KNOW HOW TO CARE FOR CONTACT LENSES	L-5 HOW TO USE CONTACT LENS SOLUTIONS	L-6 KEEP A RECORD OF ALL CONTACT LENS ORDERS	L-7 KNOW HOW TO ORDER CONTACT LENS SOLUTIONS	L-8 KEEP A RECORD OF THE DATES FOR CONTACT LENS SOLUTIONS	L-9 KEEP A RECORD OF YOUR CONTACT LENS STOCK			
SPECIFICATIONS FRAME PARTS	M-3 KNOW WHICH DISTRIBUTORS AND/OR LABS FROM WHICH TO ORDER FRAMES AND LENSES	M-4 PERFORM MINOR REPAIRS TO FRAMES	M-5 USE A FRAME CATALOGUE	M-6 KNOW HOW TO ORDER PARTS OF FRAMES	M-7 KNOW HOW TO KEEP A RECORD OF YOUR FRAME STOCK	M-8 KNOW HOW TO KEEP A RECORD OF ALL YOUR FRAME AND LENS ORDERS				

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SKILL B DEPENDABILITY	B-1 PROJECT A PROFESSIONAL APPEARANCE	B-2 ADHERE TO WORK TIME SCHEDULE	B-3 KEEP PATIENTS' CONFIDENTIALITY	B-4 ORGANIZE YOUR WORK PRIORITIES	B-5 DEVELOP GOOD LISTENING HABITS				
SKILL C TELEPHONE TECHNIQUES	C-1 USE ACCEPTABLE TELEPHONE MANNERS	C-2 DETERMINE IF YOU CAN ASSIST THIS CALLER	C-3 BE PERCEPTIVE WHEN SCREENING TELEPHONE, E.G. KNOW IF IT IS AN EMERGENCY	C-4 ANSWER THE TELEPHONE PROMPTLY	C-5 IDENTIFY CALLER IN ORDER TO SCREEN TELEPHONE CALLS	C-6 LISTEN CAREFULLY, TAKE NOTES AND DO NOT MAKE THE CALLER REPEAT THE INFORMATION	C-7 KNOW HOW TO HANDLE TELEPHONE APPOINTMENT CANCELLATIONS	C-8 KNOW HOW TO DEAL WITH TELEPHONE SHOPPERS	C-9 KNOW TELE
SKILL D APPOINTMENT MANAGEMENT	D-1 DETERMINE THE PATIENT'S NEEDS WHEN THEY ARE MAKING APPOINTMENTS	D-2 KNOW THE TIME REQUIRED FOR THE PATIENT'S APPOINTMENTS	D-3 ALWAYS OBTAIN THE PATIENT'S NAME AND TELEPHONE NUMBER	D-4 FIND OUT IF THE PATIENTS IS A NEW, REFERRED OR RE-CHECK	D-5 KNOW HOW TO RE-ARRANGE THE APPOINTMENT BOOK IN AN EMERGENCY	D-6 TELEPHONE PATIENTS TO CONFIRM APPOINTMENTS FOR THE NEXT DAY	D-7 ESTABLISH A WAITING LIST FOR PATIENTS WHO CAN BE FITTED INTO CANCELLED APPOINTMENTS		
SKILL E TERMINOLOGY	E-1 DEFINE THE OPTOMETRIC SERVICES THAT YOUR OFFICE PROVIDES	E-2 EXPLAIN THE FEE STRUCTURE FOR YOUR OFFICE	E-3 DISTINGUISH DIFFERENCES RE: AN OPTOMETRIST, OPHTHALMOLOGIST AND AN OPTICIAN	E-4 KNOW THE NAMES FOR THE PARTS OF A FRAME	E-5 KNOW THE DIFFERENT TYPES OF EYE GLASS LENSES	E-6 KNOW THE DIFFERENT TYPES OF CONTACT LENSES	E-7 KNOW THE DIFFERENT TYPES OF CONTACT LENS SOLUTIONS	E-8 DEVELOP A VOCABULARY OF TERMS RELATING TO THE ANATOMY OF THE EYE	E-9 MAINT OPTO
SKILL F RECORD MANAGEMENT	F-1 PREPARE CHARTS FOR NEW PATIENTS, REGULAR EYE EXAMS, CONTACT LENSES AND/OR VISUAL TRAINING	F-2 SET UP AN APPROPRIATE FILING SYSTEM FOR YOUR OFFICE	F-3 KNOW HOW TO CORRECTLY FILE AND RETRIEVE FILES FROM YOUR SYSTEM	F-4 KNOW HOW TO FIND A LOST FILE WITHIN YOUR SYSTEM	F-5 PREPARE DOCTOR'S DAY SHEET	F-6 MAINTAIN AN UP-TO-DATE FILING SYSTEM BY PURGING YOUR FILES ON A REGULAR BASIS	F-7 UNDERSTAND AND COMPARE DIFFERENT FILING SYSTEMS		
SKILL G ACCOUNTING	G-1 KNOW HOW TO COLLECT FEES	G-2 KNOW HOW TO COLLECT BAD DEBTS	G-3 RECORD YOUR OFFICES ACCOUNTS RECEIVABLE	G-4 UNDERSTAND HOW TO FILL OUT 3RD PARTY PAYMENTS, SUCH AS: A.H.C., SOCIAL ASSISTANCE ETC.	G-5 PROCESS YOUR OFFICE'S BANKING PROCEDURES	G-6 RECORD AND PAY YOUR OFFICE'S ACCOUNTS PAYABLE	G-7 KNOW WHAT YOUR CASH FLOAT IS AND KNOW HOW TO KEEP IT BALANCED	G-8 RECORD AND BALANCE YOUR PETTY CASH	G-9 POST TO YOUR GENERAL LEDGER AND KEEP IT BALANCED G-10 PREPA
SKILL H GENERAL OFFICE PROCEDURES	H-1 PROCESS AND DEAL WITH GOODS RECEIVED FROM COURIER SERVICE (LAB DELIVERIES)	H-2 PROCESS INCOMING MAIL	H-3 KNOW WHICH IS THE BEST COURIER SERVICES FOR YOUR OFFICE	H-4 KNOW THE MAILING PROCEDURES USED BY YOUR OFFICE, FOR EXAMPLE: C.O.D., PARCEL POST, REGISTERED MAIL					
SKILL I TYPING	I-1 TYPE THE ALBERTA HEALTH CARE FORMS	I-2 TYPE STATEMENTS (ACCOUNTS PAYABLE)	I-3 TYPE RECALL CARDS	I-4 TYPE REFERAL LETTERS TO OTHER PRACTITIONERS	I-5 TYPE MEMOS				
SKILL J WRITING COMPETENCIES	J-1 COMPOSE A SIMPLE BUSINESS LETTER	J-2 USE PROPER GRAMMAR	J-3 USE PROPER SPELLING	J-4 USE PROPER PUNCTUATION	J-5 UNDERSTAND WHAT YOU HAVE WRITTEN	J-6 PROOFREAD YOUR WORK			
SKILL K INNER OFFICE MAINTENANCE	K-1 MAINTAIN A CLEAN AND TIDY WAITING ROOM	K-2 KEEP YOUR DOCTOR'S EQUIPMENT CLEAN	K-3 KEEP YOUR OFFICE EQUIPMENT IN GOOD WORKING ORDER	K-4 ORDER PRINTING SUPPLIES, OFFICE STATIONARY, ETC.	K-5 ORDER TECHNICAL SUPPLIES	K-6 ORDER OFFICE SUPPLIES, E.G., SOAP, TOWELS, MAGAZINES, COFFEE	K-7 WATER THE PLANTS REGULARLY	K-8 KNOW HOW TO MAKE COFFEE	
SKILL L ORDERING CONTACT LENSES	L-1 KNOW HOW TO READ A PATIENT'S CONTACT LENS CHART	L-2 BE ABLE TO IDENTIFY THE TYPE OF CONTACT LENS FROM THE PATIENT'S CHARTS	L-3 KNOW THE CONTACT LENS COMPANIES REPLACEMENT POLICY AND DELIVERY DATES	L-4 KNOW HOW TO CARE FOR CONTACT LENSES	L-5 HOW TO USE CONTACT LENS SOLUTIONS	L-6 KEEP A RECORD OF ALL CONTACT LENS ORDERS	L-7 KNOW HOW TO ORDER CONTACT LENS SOLUTIONS	L-8 KEEP A RECORD OF THE DATES FOR CONTACT LENS SOLUTIONS	L K C
SKILL M ORDER OPHTHALMIC FRAMES AND LENSES	M-1 KNOW HOW TO READ A PRESCRIPTION FROM A PATIENT'S FILE	M-2 IDENTIFY SPECIFICATIONS FOR THE FRAME PARTS	M-3 KNOW WHICH DISTRIBUTORS AND/OR LABS FROM WHICH TO ORDER FRAMES AND LENSES	M-4 PERFORM MINOR REPAIRS TO FRAMES	M-5 USE A FRAME CATALOGUE	M-6 KNOW HOW TO ORDER PARTS OF FRAMES	M-7 KNOW HOW TO KEEP A RECORD OF YOUR FRAME STOCK	M-8 KNOW HOW TO KEEP A RECORD OF ALL YOUR FRAME AND LENS ORDERS	
SKILL N USE AND OPERATE BUSINESS MACHINES	N-1 USE A CALCULATOR	N-2 USE A TELEPHONE ANSWERING MACHINE	N-3 UTILIZE A DICTAPHONE	N-4 OPERATE A POSTAGE METER	N-5 OPERATE A CHEQUE WRITER	N-6 OPERATE A PHOTO COPIER	N-7 USE AND OPERATE A COMPUTER		

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O WORK TIME	B-3 KEEP PATIENTS' CONFIDENTIALITY	B-4 ORGANIZE YOUR WORK PRIORITIES	B-5 DEVELOP GOOD LISTENING HABITS							
E IF YOU CAN HIS CALLER	C-3 BE PERCEPTIVE WHEN SCREENING TELEPHONE, E.G. KNOW IF IT IS AN EMERGENCY	C-4 ANSWER THE TELEPHONE PROMPTLY	C-5 IDENTIFY CALLER IN ORDER TO SCREEN TELEPHONE CALLS	C-6 LISTEN CAREFULLY, TAKE NOTES AND DO NOT MAKE THE CALLER REPEAT THE INFORMATION	C-7 KNOW HOW TO HANDLE TELEPHONE APPOINTMENT CANCELLATIONS	C-8 KNOW HOW TO DEAL WITH TELEPHONE SHOPPERS	C-9 KNOW HOW TO USE THE TELEPHONE FOR RECALLS			
TIME REQUIRED PATIENT'S NTS	D-3 ALWAYS OBTAIN THE PATIENT'S NAME AND TELEPHONE NUMBER	D-4 FIND OUT IF THE PATIENTS IS A NEW, REFERRED OR RE-CHECK	D-5 KNOW HOW TO RE-ARRANGE THE APPOINTMENT BOOK IN AN EMERGENCY	D-6 TELEPHONE PATIENTS TO CONFIRM APPOINTMENTS FOR THE NEXT DAY	D-7 ESTABLISH A WAITING LIST FOR PATIENTS WHO CAN BE FITTED INTO CANCELLED APPOINTMENTS					
HE FEE STRUCTURE OFFICE	E-3 DISTINQUISH DIFFERENCES RE: AN OPTOMETRIST, OPHTHALMOLOGIST AND AN OPTICIAN	E-4 KNOW THE NAMES FOR THE PARTS OF A FRAME	E-5 KNOW THE DIFFERENT TYPES OF EYE GLASS LENSES	E-6 KNOW THE DIFFERENT TYPES OF CONTACT LENSES	E-7 KNOW THE DIFFERENT TYPES OF CONTACT LENS SOLUTIONS	E-8 DEVELOP A VOCABULARY OF TERMS RELATING TO THE ANATOMY OF THE EYE	E-9 MAINTAIN A DICTIONARY OF OPTOMETRIC TERMS	E-10 KNOW THE HISTORICAL OVERVIEW FOR THE OPTOMETRIC PROFESSION		
N APPROPRIATE STEN FOR YOUR	F-3 KNOW HOW TO CORRECTLY FILE AND RETRIEVE FILES FROM YOUR SYSTEM	F-4 KNOW HOW TO FIND A LOST FILE WITHIN YOUR SYSTEM	F-5 PREPARE DOCTOR'S DAY SHEET	F-6 MAINTAIN AN UP-TO-DATE FILING SYSTEM BY PURGING YOUR FILES ON A REGULAR BASIS	F-7 UNDERSTAND AND COMPARE DIFFERENT FILING SYSTEMS					
TO COLLECT BAD	G-3 RECORD YOUR OFFICES ACCOUNTS RECEIVABLE	G-4 UNDERSTAND HOW TO FILL OUT 3RD PARTY PAYMENTS, SUCH AS: A.H.C., SOCIAL ASSISTANCE ETC.	G-5 PROCESS YOUR OFFICE'S BANKING PROCEDURES	G-6 RECORD AND PAY YOUR OFFICE'S ACCOUNTS PAYABLE	G-7 KNOW WHAT YOUR CASH FLOAT IS AND KNOW HOW TO KEEP IT BALANCED	G-8 RECORD AND BALANCE YOUR PETTY CASH	G-9 POST TO YOUR GENERAL LEDGER AND KEEP IT BALANCED	G-10 PREPARE A BALANCE SHEET	G-11 PROCESS YOU OFFICE'S PAYROLL, FOR EXAMPLE: UIC, INCOME TAX, C.P.P., ECT.	G-12 PREPARE AN INCOME STATEMENT
INCOMING MAIL	H-3 KNOW WHICH IS THE BEST COURIER SERVICES FOR YOUR OFFICE	H-4 KNOW THE MAILING PROCEDURES USED BY YOUR OFFICE, FOR EXAMPLE: C.O.D., PARCEL POST, REGISTERED MAIL								
TEMENTS (ACCOUNTS	1-3 TYPE RECALL CARDS	1-4 TYPE REFERAL LETTERS TO OTHER PRACTITIONERS	1-5 TYPE MEMOS							
ER GRAMMAR	J-3 USE PROPER SPELLING	J-4 USE PROPER PUNCTUATION	J-5 UNDERSTAND WHAT YOU HAVE WRITTEN	J-6 PROOFREAD YOUR WORK						
DOCTOR'S T CLEAN	K-3 KEEP YOUR OFFICE EQUIPMENT IN GOOD WORKING ORDER	K-4 ORDER PRINTING SUPPLIES, OFFICE STATIONARY, ETC.	K-5 ORDER TECHNICAL SUPPLIES	K-6 ORDER OFFICE SUPPLIES, E.G., SOAP, TOWELS, MAGAZINES, COFFEE	K-7 WATER THE PLANTS REGULARLY	K-8 KNOW HOW TO MAKE COFFEE				
TO IDENTIFY THE CONTACT LENS FROM NT'S CHARTS	L-3 KNOW THE CONTACT LENS COMPANIES REPLACEMENT POLICY AND DELIVERY DATES	L-4 KNOW HOW TO CARE FOR CONTACT LENSES	L-5 HOW TO USE CONTACT LENS SOLUTIONS	L-6 KEEP A RECORD OF ALL CONTACT LENS ORDERS	L-7 KNOW HOW TO ORDER CONTACT LENS SOLUTIONS	L-8 KEEP A RECORD OF THE DATES FOR CONTACT LENS SOLUTIONS	L-9 KEEP A RECORD OF YOUR CONTACT LENS STOCK			
SPECIFICATIONS FRAME PARTS	M-3 KNOW WHICH DISTRIBUTORS AND/OR LABS FROM WHICH TO ORDER FRAMES AND LENSES	M-4 PERFORM MINOR REPAIRS TO FRAMES	M-5 USE A FRAME CATALOGUE	M-6 KNOW HOW TO ORDER PARTS OF FRAMES	M-7 KNOW HOW TO KEEP A RECORD OF YOUR FRAME STOCK	M-8 KNOW HOW TO KEEP A RECORD OF ALL YOUR FRAME AND LENS ORDERS				
LEPHONE ANSWERING	N-3 UTILIZE A DICTAPHONE	N-4 OPERATE A POSTAGE METER	N-5 OPERATE A CHEQUE WRITER	N-6 OPERATE A PHOTO COPIER	N-7 USE AND OPERATE A COMPUTER					

CHART 4 PROFILE of OCCUPATIONAL SKILLS and TASKS for an OPTOMETRIC ASSISTANT

SKILL A Interpersonal Skills	A-1 MAINTAIN EFFECTIVE WORKING RELATIONSHIPS WITH CO-WORKER(S), PATIENT(S) AND DOCTOR(S)	A-2 CREATE A FRIENDLY AND COMFORTABLE ATMOSPHERE	A-3 DEVELOP SENSITIVITY TO THE NEEDS OF PATIENTS	A-4 ACT IN A DIPLOMATIC MANNER	A-5 BE A GOOD LISTENER	A-6 DEVELOP COMMUNICATION COMPETENCIES	A-7 BE SELECTIVE WITH WHAT YOU SAY TO A PATIENT AND KNOW YOUR LEGAL LIMITS	A-8 EXPLAIN THE ADVANTAGES AND SERVICES PROVIDED BY AN OPTOMETRIC OFFICE	A-9 DESCRIBE THE FEE STRUCTURE THAT IS APPLIED IN YOUR OFFICE
SKILL B Education for Assistants	B-1 SEMINARS/COURSES TO UPDATE KNOWLEDGE AND TECHNOLOGY IN THE FIELD	B-2 COURSES IN COMMUNICATION SKILLS	B-3 KEEP UP WITH NEW PRODUCT KNOWLEDGE	B-4 OFFICE MANAGEMENT TRAINING COURSES	B-5 COURSES IN TIME MANAGEMENT	B-6 ASSERTIVE TRAINING	B-7 COURSES IN BASIC BEHAVIORAL PSYCHOLOGY	B-8 STRESS MANAGEMENT COURSES	B-9 RECORD MANAGEMENT COURSES (FILING SYSTEMS)
SKILL C Lens Selection	C-1 KNOW HOW TO READ AND UNDERSTAND THE MEANING OF A PRESCRIPTION FROM PATIENT'S CHART	C-2 UNDERSTAND THE FUNCTION OF PARTS OF A LENS, FOR EXAMPLE, SPHERE, CYLINDER, PRISM	C-3 BE ABLE TO ANALYZE LENSES USING A LENSMETER AND A LENS CLOCK	C-4 KNOW THE MATERIALS FROM WHICH LENSES ARE MADE	C-5 KNOW THE TYPES OF SINGLE AND MULTIVISION LENSES	C-6 KNOW THE AVAILABILITY OF LENSES	C-7 KNOW HOW THE WARRANTY APPLIES TO LENSES, FOR EXAMPLE, HARDEX LENSES	C-8 KNOW LENS FINISHES, FOR EXAMPLE, TINTS, COATINGS ETC.	C-9 KNOW HOW LENSES ARE MANUFACTURED AND THE TIME REQUIRED FOR EACH STAGE OF DEVELOPMENT
SKILL D Patient Education	D-1 EDUCATE PATIENTS ABOUT THE SERVICES AVAILABLE IN THE OFFICE	D-2 ADVISE PATIENTS ABOUT THE TYPES OF LENSES AND FRAMES AVAILABLE	D-3 EXPLAIN THE IMPORTANCE OF REGULAR EYE EXAMINATIONS	D-4 WHEN DEALING WITH A PATIENT'S QUESTION-UNDERSTAND THE LEGALITY OF YOUR STATEMENTS	D-5 EXPLAIN HOW THIRD PARTY BILLING FUNCTION, FOR EXAMPLE, A.H.C., SOCIAL SERVICES ETC.	D-6 EDUCATE THE PATIENTS ON THE MERITS OF HAVING A SPARE PAIR OF EYE GLASSES	D-7 EDUCATE PATIENTS ON HOW TO CARE FOR OPHTHALMIC APPLIANCES	D-8 WHEN REFERRALS TO OTHER HEALTH CARE OFFICES AND/OR HOSPITALS GIVE PATIENT INFORMATION	D-9 GIVE PATIENTS INSTRUCTIONS REGARDING LOW VISION AIDS
SKILL E Frame Selection	E-1 CONCEPTUALIZE THE PRESCRIPTION WHEN SELECTING A FRAME FOR THE PATIENTS	E-2 DETERMINE THE SIZE OF FRAME FOR THE PATIENT, FOR EXAMPLE, BRIDGE, EYE SIZE, TEMPLE LENGTH	E-3 UNDERSTAND THE COSMETICS OF FRAME SELECTION	E-4 KNOW THE MATERIALS AND CONSTRUCTION OF A THE FRAME	E-5 KNOW THE MANUFACTURERS OF THE FRAMES	E-6 KNOW THE AVAILABILITY OF THE FRAMES	E-7 KNOW HOW TO TAKE PATIENT'S PUPILLARY DISTANCE AND BE ABLE TO CALCULATE THEIR NEAR P.D.	E-8 KNOW THE FRAME AND LENS FEE STRUCTURE FOR THE OFFICE	E-9 BE ABLE TO READ THE FRAME MANUFACTURER'S CATALOGUE IN ORDER TO SELECT THE PROPER SIZE, COLOUR ETC. OF FRAME
SKILL F Frame Fitting (Dispensing)	F-1 VERIFY THAT THE PRESCRIPTIONS ORDERED FROM THE LAB HAS BEEN FABRICATED CORRECTLY	F-2 DISPENSE THE FRAME TO THE PATIENT	F-3 ADVISE THE PATIENT ON ADAPTATION TO NEW LENSES	F-4 INSTRUCT THE PATIENT ON THE USE AND CARE OF NEW PRESCRIPTION	F-5 OFFER REASSURANCE AND POSITIVE RE-INFORCEMENT TO THE PATIENT	F-6 GIVE PATIENTS ADVICE REGARDING FOLLOW-UP CARE WHEN NECESSARY			
SKILL G Terminology	G-1 ANATOMY: DESCRIBE HOW THE EYE IS STRUCTURED AND BE ABLE TO IDENTIFY THE MAJOR PARTS OF AN EYE	G-2 DEFINITIONS: DEFINE AND UNDERSTAND COMMON TERMS THAT RELATE TO THE EYE AND VISION	G-3 PHYSIOLOGY: DESCRIBE HOW THE EYE AND PARTS BASICALLY FUNCTION	G-4 UNDERSTAND ENOUGH TERMINOLOGY RELATING TO THE EYE TO DISTINGUISH A SIGN FROM A SYMPTOM	G-5 RECOGNIZE THE BASIC FUNCTION OF OPHTHALMIC EQUIPMENT				
SKILL H Ordering Rx from Labs	H-1 KNOW HOW TO READ THE PRESCRIPTION, LENS AND FRAME SELECTION ON A PATIENT'S CHART	H-2 KNOW HOW TO ORDER USING LAB FORMS	H-3 KNOW WHICH LAB/MANUFACTURER FROM WHICH TO GET THE DESIRED PRODUCTS	H-4 KNOW HOW LONG IT TAKES TO GET AN ORDER FROM THE LABS/MANUFACTURERS					
SKILL I Repairing & Adjustments	I-1 HAVE KNOWLEDGE OF FRAME NAMES AND FRAME PARTS	I-2 KNOW WHEN TO ADVISE PATIENTS THEY ARE DUE FOR AN EYE EXAM RATHER THAN REPAIR OUT-DATED PRESCRIPTIONS & FRAMES	I-3 KNOW WHEN NOT TO ADJUST A FRAME	I-4 BE ABLE TO IMPROVISE WITH TEMPORARY REPAIRS	I-5 KNOW THE PRODUCT AVAILABILITY	I-6 KNOW WHO TO CUSTOMIZE FRAMES WHEN POSSIBLE			
SKILL J Purchasing	J-1 BE FAMILIAR WITH RETURN POLICY AND GUARANTEES ON FRAMES	J-2 BE FAMILIAR WITH VARIOUS DISCOUNT SYSTEMS, eg., BULK PURCHASING & DISCOUNTS ON LAB BILLS	J-3 KNOW THE WARRANTY ON LENSES	J-4 KNOW THE LABORATORY WARRANTY ON CONTACT LENSES	J-5 KNOW THE LABORATORY RETURN POLICY ON CONTACT LENSES	J-6 KNOW THE SUPPLIER'S RETURN POLICY ON CONTACT LENS SOLUTIONS			
SKILL K Contact Lens	K-1 VERIFY THAT THE CONTACT LENS PRESCRIPTION FROM THE LAB IS CORRECT	K-2 PERFORM CORRECT INSERTION AND REMOVAL TECHNIQUES FOR CONTACT LENSES	K-3 DEAL WITH PATIENTS' CONCERNS REGARDING THE MISINFORMATION THEY MAY HAVE ABOUT CONTACT LENSES	K-4 KNOW CONTACT LENS MAINTENANCE	K-5 KNOW WHICH SOLUTIONS TO USE FOR THE CARE OF CONTACT LENSES	K-6 MAKE CERTAIN THAT THE PATIENT UNDERSTANDS THE WEARING SCHEDULE	K-7 MAKE CERTAIN THAT THE PATIENTS UNDERSTAND THE IMPORTANCE OF FOLLOW-UP CARE AND RECHECKS	K-8 WHEN IT APPLIES, ADVISE PATIENTS ABOUT CONTACT LENS WARRANTIES	K-9 BE ABLE TO MAKE MINOR ADJUSTMENTS TO HARD CONTACT LENSES
SKILL L			L-3 KNOW THE OFFICE'S FEE STRUCTURE REGARDING NEW CONTACT LENS PATIENTS	L-4 KNOW THE OFFICE'S FEE STRUCTURE REGARDING PATIENT'S CONTACT LENS REPLACMENT					
SKILL Materials			M-3 COST FOR FRAMES	M-4 BE AWARE OF THE CURRENT MARKET FEES WITHIN THE INDUSTRY	M-5 UNDERSTAND YOUR OFFICE'S REFERRAL FEES				

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OCCUPATIONAL SKILLS and
OPTOMETRIC ASSISTANT

D RE	A-3 DEVELOP SENSITIVITY TO THE NEEDS OF PATIENTS	A-4 ACT IN A DIPLOMATIC MANNER	A-5 BE A GOOD LISTENER	A-6 DEVELOP COMMUNICATION COMPETENCIES	A-7 BE SELECTIVE WITH WHAT YOU SAY TO A PATIENT AND KNOW YOUR LEGAL LIMITS	A-8 EXPLAIN THE ADVANTAGES AND SERVICES PROVIDED BY AN OPTOMETRIC OFFICE	A-9 DESCRIBE THE FEE STRUCTURE THAT IS APPLIED IN YOUR OFFICE	A-10 BE ABLE TO TROUBLESHOOT OPHTHALMIC APPLIANCE PROBLEMS	A-11 DEVELOP GOOD SALESMANSHIP TECHNIQUES
TION	B-3 KEEP UP WITH NEW PRODUCT KNOWLEDGE	B-4 OFFICE MANAGEMENT TRAINING COURSES	B-5 COURSES IN TIME MANAGEMENT	B-6 ASSERTIVE TRAINING	B-7 COURSES IN BASIC BEHAVIORAL PSYCHOLOGY	B-8 STRESS MANAGEMENT COURSES	B-9 RECORD MANAGEMENT COURSES (FILING SYSTEMS)	B-10 COURSES REGARDING FIRST AID	
TION FOR	C-3 BE ABLE TO ANALYZE LENSES USING A LENSMETER AND A LENS CLOCK	C-4 KNOW THE MATERIALS FROM WHICH LENSES ARE MADE	C-5 KNOW THE TYPES OF SINGLE AND MULTIVISION LENSES	C-6 KNOW THE AVAILABILITY OF LENSES	C-7 KNOW HOW THE WARRANTY APPLIES TO LENSES, FOR EXAMPLE, HARDEX LENSES	C-8 KNOW LENS FINISHES, FOR EXAMPLE, TINTS, COATINGS ETC.	C-9 KNOW HOW LENSES ARE MANUFACTURED AND THE TIME REQUIRED FOR EACH STAGE OF DEVELOPMENT		
T THE	D-3 EXPLAIN THE IMPORTANCE OF REGULAR EYE EXAMINATIONS	D-4 WHEN DEALING WITH A PATIENT'S QUESTION-UNDERSTAND THE LEGALITY OF YOUR STATEMENTS	D-5 EXPLAIN HOW THIRD PARTY BILLING FUNCTION, FOR EXAMPLE, A.H.C., SOCIAL SERVICES ETC.	D-6 EDUCATE THE PATIENTS ON THE MERITS OF HAVING A SPARE PAIR OF EYE GLASSES	D-7 EDUCATE PATIENTS ON HOW TO CARE FOR OPHTHALMIC APPLIANCES	D-8 WHEN REFERRALS TO OTHER HEALTH CARE OFFICES AND/OR HOSPITALS GIVE PATIENT INFORMATION	D-9 GIVE PATIENTS INSTRUCTIONS REGARDING LOW VISION AIDS		
F T, EYE	E-3 UNDERSTAND THE COSMETICS OF FRAME SELECTION	E-4 KNOW THE MATERIALS AND CONSTRUCTION OF A THE FRAME	E-5 KNOW THE MANUFACTURERS OF THE FRAMES	E-6 KNOW THE AVAILABILITY OF THE FRAMES	E-7 KNOW HOW TO TAKE PATIENT'S PUPILLARY DISTANCE AND BE ABLE TO CALCULATE THEIR NEAR P.D.	E-8 KNOW THE FRAME AND LENS FEE STRUCTURE FOR THE OFFICE	E-9 BE ABLE TO READ THE FRAME MANUFACTURER'S CATALOGUE IN ORDER TO SELECT THE PROPER SIZE, COLOUR ETC. OF FRAME	E-10 BE ABLE TO MEASURE A PATIENT'S BIFOCAL HEIGHT	E-11 KNOW THE COURIER SERVICES AVAILABLE FROM THE LABS
O THE	F-3 ADVISE THE PATIENT ON ADAPTATION TO NEW LENSES	F-4 INSTRUCT THE PATIENT ON THE USE AND CARE OF NEW PRESCRIPTION	F-5 OFFER REASSURANCE AND POSITIVE RE-INFORCEMENT TO THE PATIENT	F-6 GIVE PATIENTS ADVICE REGARDING FOLLOW-UP CARE WHEN NECESSARY					
ND RNS E	G-3 PHYSIOLOGY: DESCRIBE HOW THE EYE AND PARTS BASICALLY FUNCTION	G-4 UNDERSTAND ENOUGH TERMINOLOGY RELATING TO THE EYE TO DISTINGUISH A SIGN FROM A SYMPTOM	G-5 RECOGNIZE THE BASIC FUNCTION OF OPHTHALMIC EQUIPMENT						
ING	H-3 KNOW WHICH LAB/MANUFACTURER FROM WHICH TO GET THE DESIRED PRODUCTS	H-4 KNOW HOW LONG IT TAKES TO GET AN ORDER FROM THE LABS/MANUFACTURERS							
FOR AN	I-3 KNOW WHEN NOT TO ADJUST A FRAME	I-4 BE ABLE TO IMPROVISE WITH TEMPORARY REPAIRS	I-5 KNOW THE PRODUCT AVAILABILITY	I-6 KNOW WHO TO CUSTOMIZE FRAMES WHEN POSSIBLE					
S	J-3 KNOW THE WARRANTY ON LENSES	J-4 KNOW THE LABORATORY WARRANTY ON CONTACT LENSES	J-5 KNOW THE LABORATORY RETURN POLICY ON CONTACT LENSES	J-6 KNOW THE SUPPLIER'S RETURN POLICY ON CONTACT LENS SOLUTIONS					
ION	K-3 DEAL WITH PATIENTS' CONCERNS REGARDING THE MISINFORMATION THEY MAY HAVE ABOUT CONTACT LENSES	K-4 KNOW CONTACT LENS MAINTENANCE	K-5 KNOW WHICH SOLUTIONS TO USE FOR THE CARE OF CONTACT LENSES	K-6 MAKE CERTAIN THAT THE PATIENT UNDERSTANDS THE WEARING SCHEDULE	K-7 MAKE CERTAIN THAT THE PATIENTS UNDERSTAND THE IMPORTANCE OF FOLLOW-UP CARE AND RECHECKS	K-8 WHEN IT APPLIES, ADVISE PATIENTS ABOUT CONTACT LENS WARRANTIES	K-9 BE ABLE TO MAKE MINOR ADJUSTMENTS TO HARD CONTACT LENSES		
R A	L-3 KNOW THE OFFICE'S FEE STRUCTURE REGARDING NEW CONTACT LENS PATIENTS	L-4 KNOW THE OFFICE'S FEE STRUCTURE REGARDING PATIENT'S CONTACT LENS REPLACMENT							
	M-3 COST FOR FRAMES	M-4 BE AWARE OF THE CURRENT MARKET FEES WITHIN THE INDUSTRY	M-5 UNDERSTAND YOUR OFFICE'S REFERRAL FEES						
	N-3	N-4	N-5						

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SKILL B Education for Assistants	B-1 SEMINARS/COURSES TO UPDATE KNOWLEDGE AND TECHNOLOGY IN THE FIELD	B-2 COURSES IN COMMUNICATION SKILLS	B-3 KEEP UP WITH NEW PRODUCT KNOWLEDGE	B-4 OFFICE MANAGEMENT TRAINING COURSES	B-5 COURSES IN TIME MANAGEMENT	B-6 ASSERTIVE TRAINING	B-7 COURSES IN BASIC BEHAVIORAL PSYCHOLOGY	B-8 STRESS MANAGEMENT COURSES	B-9 RECORD MANAGEMENT COURSES (FILING SYSTEMS)	B-10 COURS AID
SKILL C Lens Selection	C-1 KNOW HOW TO READ AND UNDERSTAND THE MEANING OF A PRESCRIPTION FROM PATIENT'S CHART	C-2 UNDERSTAND THE FUNCTION OF PARTS OF A LENS, FOR EXAMPLE, SPHERE, CYLINDER, PRISM	C-3 BE ABLE TO ANALYZE LENSES USING A LENSMETER AND A LENS CLOCK	C-4 KNOW THE MATERIALS FROM WHICH LENSES ARE MADE	C-5 KNOW THE TYPES OF SINGLE AND MULTIVISION LENSES	C-6 KNOW THE AVAILABILITY OF LENSES	C-7 KNOW HOW THE WARRANTY APPLIES TO LENSES, FOR EXAMPLE, HARDEX LENSES	C-8 KNOW LENS FINISHES, FOR EXAMPLE, TINTS, COATINGS ETC.	C-9 KNOW HOW LENSES ARE MANUFACTURED AND THE TIME REQUIRED FOR EACH STAGE OF DEVELOPMENT	
SKILL D Patient Education	D-1 EDUCATE PATIENTS ABOUT THE SERVICES AVAILABLE IN THE OFFICE	D-2 ADVISE PATIENTS ABOUT THE TYPES OF LENSES AND FRAMES AVAILABLE	D-3 EXPLAIN THE IMPORTANCE OF REGULAR EYE EXAMINATIONS	D-4 WHEN DEALING WITH A PATIENT'S QUESTION-UNDERSTAND THE LEGALITY OF YOUR STATEMENTS	D-5 EXPLAIN HOW THIRD PARTY BILLING FUNCTION, FOR EXAMPLE, A.H.C., SOCIAL SERVICES ETC.	D-6 EDUCATE THE PATIENTS ON THE MERITS OF HAVING A SPARE PAIR OF EYE GLASSES	D-7 EDUCATE PATIENTS ON HOW TO CARE FOR OPHTHALMIC APPLIANCES	D-8 WHEN REFERRALS TO OTHER HEALTH CARE OFFICES AND/OR HOSPITALS GIVE PATIENT INFORMATION	D-9 GIVE PATIENTS INSTRUCTIONS REGARDING LOW VISION AIDS	
SKILL E Frame Selection	E-1 CONCEPTUALIZE THE PRESCRIPTION WHEN SELECTING A FRAME FOR THE PATIENTS	E-2 DETERMINE THE SIZE OF FRAME FOR THE PATIENT, FOR EXAMPLE, BRIDGE, EYE SIZE, TEMPLE LENGTH	E-3 UNDERSTAND THE COSMETICS OF FRAME SELECTION	E-4 KNOW THE MATERIALS AND CONSTRUCTION OF A THE FRAME	E-5 KNOW THE MANUFACTURERS OF THE FRAMES	E-6 KNOW THE AVAILABILITY OF THE FRAMES	E-7 KNOW HOW TO TAKE PATIENT'S PUPILLARY DISTANCE AND BE ABLE TO CALCULATE THEIR NEAR P.D.	E-8 KNOW THE FRAME AND LENS FEE STRUCTURE FOR THE OFFICE	E-9 BE ABLE TO READ THE FRAME MANUFACTURER'S CATALOGUE IN ORDER TO SELECT THE PROPER SIZE, COLOUR ETC. OF FRAME	E-10 BE AB PATIE
SKILL F Frame Fitting (Dispensing)	F-1 VERIFY THAT THE PRESCRIPTIONS ORDERED FROM THE LAB HAS BEEN FABRICATED CORRECTLY	F-2 DISPENSE THE FRAME TO THE PATIENT	F-3 ADVISE THE PATIENT ON ADAPTATION TO NEW LENSES	F-4 INSTRUCT THE PATIENT ON THE USE AND CARE OF NEW PRESCRIPTION	F-5 OFFER REASSURANCE AND POSITIVE RE-INFORCEMENT TO THE PATIENT	F-6 GIVE PATIENTS ADVICE REGARDING FOLLOW-UP CARE WHEN NECESSARY				
SKILL G Terminology	G-1 ANATOMY: DESCRIBE HOW THE EYE IS STRUCTURED AND BE ABLE TO IDENTIFY THE MAJOR PARTS OF AN EYE	G-2 DEFINITIONS: DEFINE AND UNDERSTAND COMMON TERMS THAT RELATE TO THE EYE AND VISION	G-3 PHYSIOLOGY: DESCRIBE HOW THE EYE AND PARTS BASICALLY FUNCTION	G-4 UNDERSTAND ENOUGH TERMINOLOGY RELATING TO THE EYE TO DISTINGUISH A SIGN FROM A SYMPTOM	G-5 RECOGNIZE THE BASIC FUNCTION OF OPHTHALMIC EQUIPMENT					
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SKILL I Repairing & Adjustments	I-1 HAVE KNOWLEDGE OF FRAME NAMES AND FRAME PARTS	I-2 KNOW WHEN TO ADVISE PATIENTS THEY ARE DUE FOR AN EYE EXAM RATHER THAN REPAIR OUT-DATED PRESCRIPTIONS & FRAMES	I-3 KNOW WHEN NOT TO ADJUST A FRAME	I-4 BE ABLE TO IMPROVISE WITH TEMPORARY REPAIRS	I-5 KNOW THE PRODUCT AVAILABILITY	I-6 KNOW WHO TO CUSTOMIZE FRAMES WHEN POSSIBLE				
SKILL J Purchasing	J-1 BE FAMILIAR WITH RETURN POLICY AND GUARANTEES ON FRAMES	J-2 BE FAMILIAR WITH VARIOUS DISCOUNT SYSTEMS, eg., BULK PURCHASING & DISCOUNTS ON LAB BILLS	J-3 KNOW THE WARRANTY ON LENSES	J-4 KNOW THE LABORATORY WARRANTY ON CONTACT LENSES	J-5 KNOW THE LABORATORY RETURN POLICY ON CONTACT LENSES	J-6 KNOW THE SUPPLIER'S RETURN POLICY ON CONTACT LENS SOLUTIONS				
SKILL K Contact Lens Dispensing	K-1 VERIFY THAT THE CONTACT LENS PRESCRIPTION FROM THE LAB IS CORRECT	K-2 PERFORM CORRECT INSERTION AND REMOVAL TECHNIQUES FOR CONTACT LENSES	K-3 DEAL WITH PATIENTS' CONCERNS REGARDING THE MISINFORMATION THEY MAY HAVE ABOUT CONTACT LENSES	K-4 KNOW CONTACT LENS MAINTENANCE	K-5 KNOW WHICH SOLUTIONS TO USE FOR THE CARE OF CONTACT LENSES	K-6 MAKE CERTAIN THAT THE PATIENT UNDERSTANDS THE WEARING SCHEDULE	K-7 MAKE CERTAIN THAT THE PATIENTS UNDERSTAND THE IMPORTANCE OF FOLLOW-UP CARE AND RECHECKS	K-8 WHEN IT APPLIES, ADVISE PATIENTS ABOUT CONTACT LENS WARRANTIES	K-9 BE ABLE TO MAKE MINOR ADJUSTMENTS TO HARD CONTACT LENSES	
SKILL L Order Contact Lenses from Labs	L-1 KNOW AND UNDERDERSAND THE PRESCRIPTION FROM A PATIENTS' CONTACT LENS CHART	L-2 KNOW WHICH LAB TO ORDER A SPECIFIC WHICH TYPE OF CONTACT LENS	L-3 KNOW THE OFFICE'S FEE STRUCTURE REGARDING NEW CONTACT LENS PATIENTS	L-4 KNOW THE OFFICE'S FEE STRUCTURE REGARDING PATIENT'S CONTACT LENS REPLACMENT						
SKILL M Cost Analysis for Materials	M-1 COST FOR LENSES	M-2 KNOW YOUR OFFICE'S DISPENSING FEES	M-3 COST FOR FRAMES	M-4 BE AWARE OF THE CURRENT MARKET FEES WITHIN THE INDUSTRY	M-5 UNDERSTAND YOUR OFFICE'S REFERRAL FEES					
SKILL N Handle Telephone	N-1 KEEP CONVERSATION GENERAL WHEN DEALING WITH TELEPHONE SHOPPERS	N-2 KNOW HOW TO LIMIT THE QUESTIONS AND ANSWERS WHEN DEALING WITH A TELEPHONE SHOPPER	N-3 BE NON-COMMITTAL REGARDING FEES WHEN DEALING WITH A TELEPHONE SHOPPER	N-4 SECURE THE TELEPHONE SHOPPER'S NAME AND PHONE NUMBER (SOMETIMES ADDRESS IN ORDER TO MAIL THEM INFORMATION)	N-5 DIRECT THE TELEPHONE SHOPPER INTO THE OFFICE IN ORDER TO FURTHER ANSWER THEIR SPECIFIC QUESTIONS					
SKILL O Preliminary Screening	O-1 UNDERSAND WHY YOU PRE-TEST	O-2 FILING OUT PATIENTS' CARDS, RE: HISTORY	O-3 CHECK UNCORRECTED OR UNAIDED VISUAL ACUITY	O-4 BE ABLE TO USE A TONOMETER	O-5 CHECK PATIENT FOR COLOUR VISION DEFECTS	O-6 PERFORM FIELD TESTING	O-7 CHECK FOR BINOCULAR VISION	O-8 TAKE BLOOD PRESSURE READINGS		
SKILL P Visual Training	P-1 UNDERSTANDING BASIC TERMINOLOGY	P-2 ADMINISTER HEALTH HISTORY QUESTIONNAIRE	P-3 UNDERSTAND BASIC VISUAL TRAINING EQUIPMENT	P-4 UNDERSTAND VISUAL TRAINING TECHNIQUES	P-5 KNOW HOW TO USE VISUAL TRAINING EQUIPMENT	P-6 MOTIVATE THE PATIENT TO MAINTAIN VISUAL TRAINING THERAPY	P-7 MAINTAIN PATIENT'S VISUAL TRAINING PROGRESS CHARTS FOR THE DOCTOR			
SKILL Q Financial Statements	Q - 1 ANALYZE FINANCIAL STATEMENTS IN ORDER TO MAKE OFFICE PROJECTION DECISIONS	Q - 2 BE ABLE TO DO COST ACCOUNTING, FOR EXAMPLE, COST-VOLUMNE-PROFIT ANALYSIS	Q - 3 UNDERSTAND TAX CONSIDERATIONS IN BUSINESS DECISION		SKILL R Math	R-1 PERFORM BASIC MATHEMATICAL OPERATIONS	R-2 COMPUTE WITH DOLLARS AND CENTS	R-3 UNDERSTAND BASIC PRINCIPLES OF ALGEBRA	R-4 CALCULATE WEIGHTS AND MEASURES	

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N	B-3 KEEP UP WITH NEW PRODUCT KNOWLEDGE	B-4 OFFICE MANAGEMENT TRAINING COURSES	B-5 COURSES IN TIME MANAGEMENT	B-6 ASSERTIVE TRAINING	B-7 COURSES IN BASIC BEHAVIORAL PSYCHOLOGY	B-8 STRESS MANAGEMENT COURSES	B-9 RECORD MANAGEMENT COURSES (FILING SYSTEMS)	B-10 COURSES REGARDING FIRST AID	
ON OR	C-3 BE ABLE TO ANALYZE LENSES USING A LENSMETER AND A LENS CLOCK	C-4 KNOW THE MATERIALS FROM WHICH LENSES ARE MADE	C-5 KNOW THE TYPES OF SINGLE AND MULTIVISION LENSES	C-6 KNOW THE AVAILABILITY OF LENSES	C-7 KNOW HOW THE WARRANTY APPLIES TO LENSES, FOR EXAMPLE, HARDEX LENSES	C-8 KNOW LENS FINISHES, FOR EXAMPLE, TINTS, COATINGS ETC.	C-9 KNOW HOW LENSES ARE MANUFACTURED AND THE TIME REQUIRED FOR EACH STAGE OF DEVELOPMENT		
THE	D-3 EXPLAIN THE IMPORTANCE OF REGULAR EYE EXAMINATIONS	D-4 WHEN DEALING WITH A PATIENT'S QUESTION-UNDERSTAND THE LEGALITY OF YOUR STATEMENTS	D-5 EXPLAIN HOW THIRD PARTY BILLING FUNCTION, FOR EXAMPLE, A.H.C., SOCIAL SERVICES ETC.	D-6 EDUCATE THE PATIENTS ON THE MERITS OF HAVING A SPARE PAIR OF EYE GLASSES	D-7 EDUCATE PATIENTS ON HOW TO CARE FOR OPHTHALMIC APPLIANCES	D-8 WHEN REFERRALS TO OTHER HEALTH CARE OFFICES AND/OR HOSPITALS GIVE PATIENT INFORMATION	D-9 GIVE PATIENTS INSTRUCTIONS REGARDING LOW VISION AIDS		
E	E-3 UNDERSTAND THE COSMETICS OF FRAME SELECTION	E-4 KNOW THE MATERIALS AND CONSTRUCTION OF A THE FRAME	E-5 KNOW THE MANUFACTURERS OF THE FRAMES	E-6 KNOW THE AVAILABILITY OF THE FRAMES	E-7 KNOW HOW TO TAKE PATIENT'S PUPILLARY DISTANCE AND BE ABLE TO CALCULATE THEIR NEAR P.D.	E-8 KNOW THE FRAME AND LENS FEE STRUCTURE FOR THE OFFICE	E-9 BE ABLE TO READ THE FRAME MANUFACTURER'S CATALOGUE IN ORDER TO SELECT THE PROPER SIZE, COLOUR ETC. OF FRAME	E-10 BE ABLE TO MEASURE A PATIENT'S BIFOCAL HEIGHT	E-11 KNOW THE COURIER SERVICES AVAILABLE FROM THE LABS
THE	F-3 ADVISE THE PATIENT ON ADAPTATION TO NEW LENSES	F-4 INSTRUCT THE PATIENT ON THE USE AND CARE OF NEW PRESCRIPTION	F-5 OFFER REASSURANCE AND POSITIVE RE-INFORCEMENT TO THE PATIENT	F-6 GIVE PATIENTS ADVICE REGARDING FOLLOW-UP CARE WHEN NECESSARY					
S	G-3 PHYSIOLOGY: DESCRIBE HOW THE EYE AND PARTS BASICALLY FUNCTION	G-4 UNDERSTAND ENOUGH TERMINOLOGY RELATING TO THE EYE TO DISTINGUISH A SIGN FROM A SYMPTOM	G-5 RECOGNIZE THE BASIC FUNCTION OF OPHTHALMIC EQUIPMENT						
G	H-3 KNOW WHICH LAB/MANUFACTURER FROM WHICH TO GET THE DESIRED PRODUCTS	H-4 KNOW HOW LONG IT TAKES TO GET AN ORDER FROM THE LABS/MANUFACTURERS							
OR	I-3 KNOW WHEN NOT TO ADJUST A FRAME	I-4 BE ABLE TO IMPROVISE WITH TEMPORARY REPAIRS	I-5 KNOW THE PRODUCT AVAILABILITY	I-6 KNOW WHO TO CUSTOMIZE FRAMES WHEN POSSIBLE					
	J-3 KNOW THE WARRANTY ON LENSES	J-4 KNOW THE LABORATORY WARRANTY ON CONTACT LENSES	J-5 KNOW THE LABORATORY RETURN POLICY ON CONTACT LENSES	J-6 KNOW THE SUPPLIER'S RETURN POLICY ON CONTACT LENS SOLUTIONS					
N	K-3 DEAL WITH PATIENTS' CONCERNS REGARDING THE MISINFORMATION THEY MAY HAVE ABOUT CONTACT LENSES	K-4 KNOW CONTACT LENS MAINTENANCE	K-5 KNOW WHICH SOLUTIONS TO USE FOR THE CARE OF CONTACT LENSES	K-6 MAKE CERTAIN THAT THE PATIENT UNDERSTANDS THE WEARING SCHEDULE	K-7 MAKE CERTAIN THAT THE PATIENTS UNDERSTAND THE IMPORTANCE OF FOLLOW-UP CARE AND RECHECKS	K-8 WHEN IT APPLIES, ADVISE PATIENTS ABOUT CONTACT LENS WARRANTIES	K-9 BE ABLE TO MAKE MINOR ADJUSTMENTS TO HARD CONTACT LENSES		
A	L-3 KNOW THE OFFICE'S FEE STRUCTURE REGARDING NEW CONTACT LENS PATIENTS	L-4 KNOW THE OFFICE'S FEE STRUCTURE REGARDING PATIENT'S CONTACT LENS REPLACMENT							
	M-3 COST FOR FRAMES	M-4 BE AWARE OF THE CURRENT MARKET FEES WITHIN THE INDUSTRY	M-5 UNDERSTAND YOUR OFFICE'S REFERRAL FEES						
	N-3 BE NON-COMMITTAL REGARDING FEES WHEN DEALING WITH A TELEPHONE SHOPPER	N-4 SECURE THE TELEPHONE SHOPPER'S NAME AND PHONE NUMBER (SOMETIMES ADDRESS IN ORDER TO MAIL THEN INFORMATION)	N-5 DIRECT THE TELEPHONE SHOPPER INTO THE OFFICE IN ORDER TO FURTHER ANSWER THEIR SPECIFIC QUESTIONS						
	O-3 CHECK UNCORRECTED OR UNAIDED VISUAL ACUITY	O-4 BE ABLE TO USE A TONOMETER	O-5 CHECK PATIENT FOR COLOUR VISION DEFECTS	O-6 PERFORM FIELD TESTING	O-7 CHECK FOR BINOCULAR VISION	O-8 TAKE BLOOD PRESSURE READINGS			
	P-3 UNDERSTAND BASIC VISUAL TRAINING EQUIPMENT	P-4 UNDERSTAND VISUAL TRAINING TECHNIQUES	P-5 KNOW HOW TO USE VISUAL TRAINING EQUIPMENT	P-6 MOTIVATE THE PATIENT TO MAINTAIN VISUAL TRAINING THERAPY	P-7 MAINTAIN PATIENT'S VISUAL TRAINING PROGRESS CHARTS FOR THE DOCTOR				
	Q - 3 UNDERSTAND TAX CONSIDERATIONS IN BUSINESS DECISION		SKILL R Math	R-1 PERFORM BASIC MATHEMATICAL OPERATIONS	R-2 COMPUTE WITH DOLLARS AND CENTS	R-3 UNDERSTAND BASIC PRINCIPLES OF ALGEBRA	R-4 CALCULATE WEIGHTS AND MEASURES		

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